



**WEBREGISTRY  
MARKET OPERATOR REGISTRATION  
QUICK REFERENCE GUIDE v1.0**

**OPEN ACCESS TECHNOLOGY INTERNATIONAL, INC.**

APRIL 2017

**PROPRIETARY AND CONFIDENTIAL**

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## **1. Introduction**

The purpose of this document is to serve as a quick reference guide for Market Operators (MOs) to register under the MO role in the North American Energy Standards Board (NAESB) Electric Industry Registry (EIR) system, or update their existing registration, for use in the functionality outlined in v1.8.3 of the NAESB e-Tag specifications.

### **1.1 New MO Registration**

This section describes the steps to register a new MO code-role.

### **1.2 Updating Existing MOs**

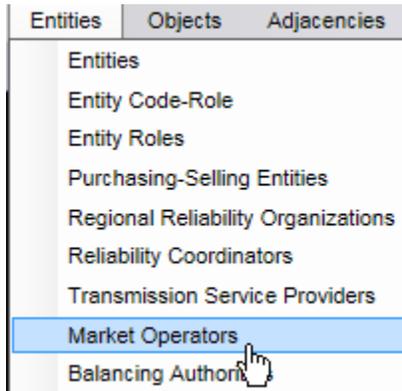
Existing MO registrations will need to be updated with additional information so that the registration can be used on e-Tags. This section describes the steps to update an existing MO code-role to add the additional required information.

## 2. New MO Registration

This section describes the steps to register a new MO code-role.

### 1. Open Market Operators Summary Display.

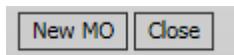
Open the Market Operators Summary display, located under Entities > Market Operators.



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### 2. Open Market Operator Entry Display.

Click on the “new MO” button to open the Market Operator display.



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### 3. Select Entity.

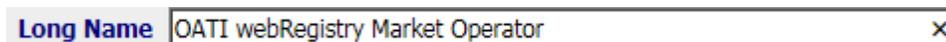
Select the Entity that the new MO will belong to.



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### 4. Enter Long Name.

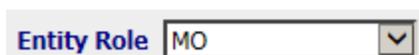
Enter the Long Name for the MO.



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### 5. Select Entity Role.

The Entity Role of “MO” should be pre-selected. No action is needed.



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## 6. Enter Entity Role Code.

Enter the name of the Entity Role Code



The screenshot shows a text input field with the label "Entity Role Code" and the value "OWMO". There is a small 'x' icon in the top right corner of the input field.

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## 7. Enter Effective Dates.

Enter the Effective Start and Effective Stop Dates of the new MO.

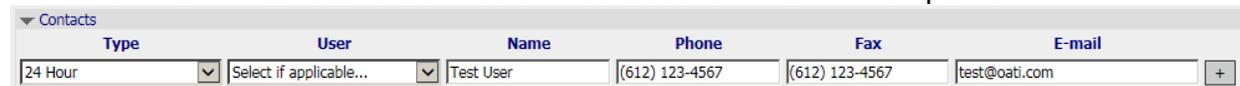


The screenshot shows two date input fields. The first is labeled "Effective Date" and contains the date "04/10/2017". The second contains the date "01/01/3000". Both fields have a calendar icon to their right.

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## 8. Enter Contacts Information.

Enter the Contacts information for the MO. A “24 Hour” contact is required.

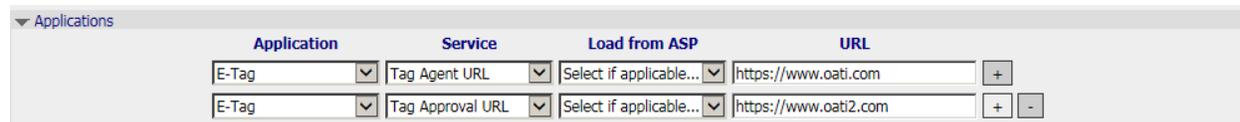


The screenshot shows a table with the following columns: Type, User, Name, Phone, Fax, and E-mail. The first row contains the following values: "24 Hour" (in a dropdown), "Select if applicable..." (in a dropdown), "Test User", "(612) 123-4567", "(612) 123-4567", and "test@oati.com". There is a "+" button at the end of the row.

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## 9. Enter Applications URL Information.

Enter the Applications URL information for the MO. An E-Tag “Tag Agent URL” and an E-Tag “Tag Approval URL” are both required.



The screenshot shows a table with the following columns: Application, Service, Load from ASP, and URL. The first row contains: "E-Tag" (in a dropdown), "Tag Agent URL" (in a dropdown), "Select if applicable..." (in a dropdown), and "https://www.oati.com". The second row contains: "E-Tag" (in a dropdown), "Tag Approval URL" (in a dropdown), "Select if applicable..." (in a dropdown), and "https://www.oati2.com". There are "+" and "-" buttons at the end of each row.

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## 10. Enter Balancing Authority (BA) / Transmission Service Provider (TSP) Associations.

Enter the BAs/TSPs that are associated with the MO. To enter a BA/TSP association, first select the Type {BA, TSP} from the dropdown. Then select the BA or TSP from the Code dropdown. Multiple BAs/TSPs may be associated with a single MO. At least one BA or TSP association is required.

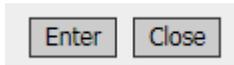


The screenshot shows a form with the label "BA/TSP Associations". It contains two dropdown menus: "Type" with the value "BA" and "Code" with the value "TEST". There is a "+" button to the right of the "Code" dropdown.

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11. Click on the “Enter” Button.

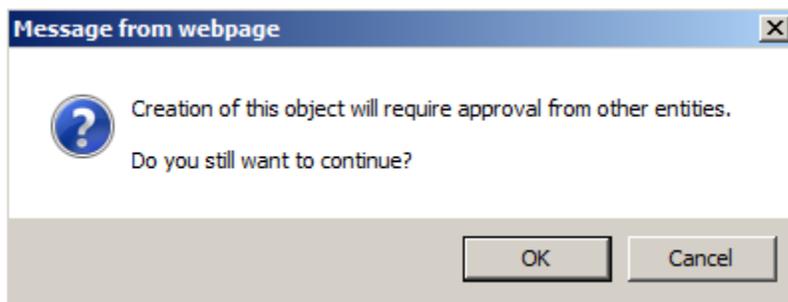
Click the “Enter” button to submit the MO.



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12. Click on the “OK” Button to Confirm.

Review the pop-up text, and click the “OK” button to confirm.



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13. Approvals.

The new MO must be approved by NAESB, and each of the BAs/TSPs that are associated with it.

14. Payment.

Once the code-role has been fully approved, the code role must be paid for. The payment can be made via the "Payment > Subscription Summary" display, by clicking on the "New Payment" button.

### 3. Update Existing MOs

Existing MO registrations will need to be updated with additional information so that the registration can be used on e-Tags. This section describes the steps to update an existing MO code-role to add the additional required information.

1. Open Market Operators Summary Display.

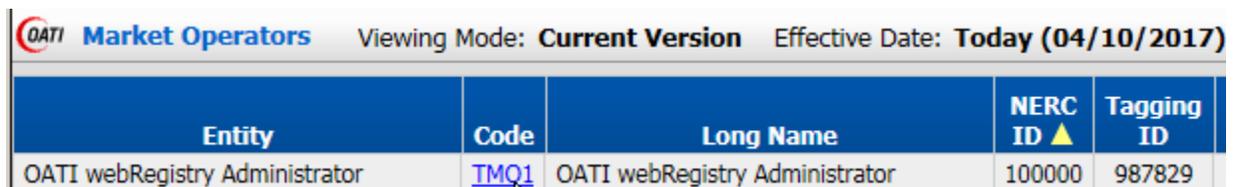
Open the Market Operators Summary display, located under Entities > Market Operators.



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2. Open the Existing MO.

Click on the link of the existing MO to be updated under the “Code” column in the Market Operators Summary display to edit the MO in the Market Operator Entry display.



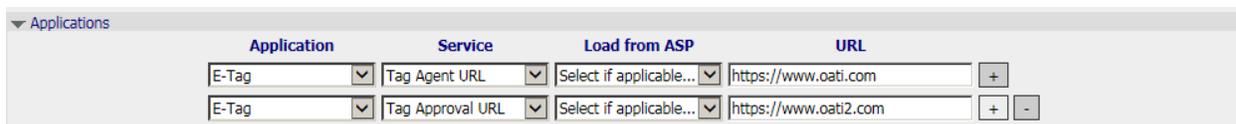
The screenshot shows the 'Market Operators' summary display. At the top, it says 'OATI Market Operators' and 'Viewing Mode: Current Version Effective Date: Today (04/10/2017)'. Below this is a table with the following data:

| Entity                         | Code                 | Long Name                      | NERC ID ▲ | Tagging ID |
|--------------------------------|----------------------|--------------------------------|-----------|------------|
| OATI webRegistry Administrator | <a href="#">TMQ1</a> | OATI webRegistry Administrator | 100000    | 987829     |

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3. Enter Applications URL Information.

Enter the Applications URL information for the MO. An e-Tag “Tag Agent URL” and an e-Tag “Tag Approval URL” are both required if they are not already entered for the MO.



The screenshot shows the 'Applications' section of the interface. It contains two rows of application information:

| Application | Service          | Load from ASP           | URL                   |
|-------------|------------------|-------------------------|-----------------------|
| E-Tag       | Tag Agent URL    | Select if applicable... | https://www.oati.com  |
| E-Tag       | Tag Approval URL | Select if applicable... | https://www.oati2.com |

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#### 4. Enter BA/TSP Associations.

Enter the BAs/TSPs that are associated with the MO. To enter a BA/TSP association, first select the Type {BA, TSP} from the dropdown. Then select the BA or TSP from the Code dropdown. Multiple BAs/TSPs may be associated with a single MO. At least one BA or TSP association is required.

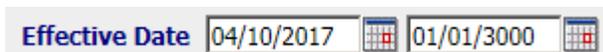


The screenshot shows a form titled "BA/TSP Associations". It features two dropdown menus: "Type" with "BA" selected and "Code" with "TEST" selected. A plus sign button is located to the right of the "Code" dropdown.

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#### 5. Update Effective Start Date.

The Effective Start Date of the updated MO must be updated to start on the current date, or a future date if the changes are intended to take effect on a later date.

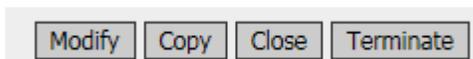


The screenshot shows the "Effective Date" field with a date range of "04/10/2017" to "01/01/3000". Each date is followed by a calendar icon.

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#### 6. Click on the “Modify” Button.

Click the “Modify” button to submit changes for the MO.

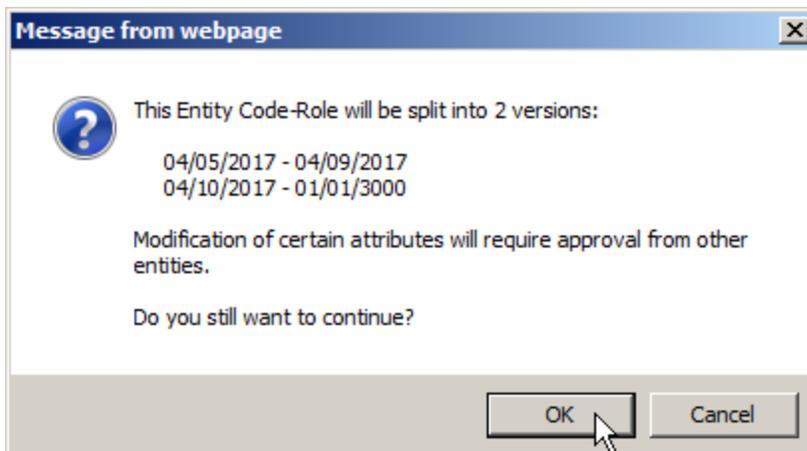


The screenshot shows four buttons: "Modify", "Copy", "Close", and "Terminate".

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#### 7. Click on the “OK” button to Confirm.

Review the pop-up text, and click the “OK” button to confirm.



The screenshot shows a message dialog box titled "Message from webpage". It contains a question mark icon and the following text: "This Entity Code-Role will be split into 2 versions:", "04/05/2017 - 04/09/2017", "04/10/2017 - 01/01/3000", "Modification of certain attributes will require approval from other entities.", and "Do you still want to continue?". At the bottom, there are "OK" and "Cancel" buttons.

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## 8. Approvals.

The changes must be approved by NAESB, and each of the BAs/TSPs that were associated with the MO.