NORTH AMERICAN ENERGY STANDARDS BOARD

MARCH 2012

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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. The information that registering requires is limited in amount, and the system will support some import from the TSIN registry records, for example, after entering an entity code, the system will present all of the TSIN information associated with that entity code for upload into webRegistry. After verifying the data, an Entity can select what data to bring over from the current 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.”
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.

A digital certificate from a NAESB approved Certificate Authority (CA) is required to access the Application for Registration. If a user does not present a certificate from a valid CA, a message will open displaying the list of NAESB approved CAs.

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A digital certificate can be linked to one user account. If the certificate the user presented is already linked to a user account, a message will be displayed that the certificate has already been used in the system.
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.

When creating a new Entity, the user can load data from TSIN. The webRegistry system will search the TSIN database for entities based on the Entity Code provided in the Entity Entry page.

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

When entering a Code-Role, the user can load data from TSIN. The webRegistry system will search the TSIN database for entities based on the Entity and Role provided in the Entity Code-Role Entry page.
4. Entities Menu

The main administrative object within webRegistry is an entity. 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.

Entities can have multiple functions (or roles) in the registry. 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 Code column. Modifications to entities can be made from this page.
4.2 Entity Code-Role

Entities can 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 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 and PSE that may share the same code. However, the combination of an Entity Role and Entity Code will be unique in webRegistry.

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 can 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 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 RCs display shows users the RCs within the system. Information provided about the RC includes the name, NERC ID, and approval status.

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

4.6 Transmission Service Providers

The 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 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.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Code</th>
<th>Long Name</th>
<th>Short Name</th>
<th>NERC ID</th>
<th>Market Area</th>
<th>Contacts</th>
<th>Effective Date</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balancing Area 1</td>
<td>BABTSP</td>
<td>Baby Balancing Area</td>
<td>BABTSP</td>
<td>164</td>
<td>MISO</td>
<td>View</td>
<td>8/19/2011</td>
<td>Approved</td>
</tr>
<tr>
<td>Balancing Area 2</td>
<td>BATS2</td>
<td>Baby Balancing Area 2</td>
<td>BATS2</td>
<td>1702</td>
<td>MISO</td>
<td>View</td>
<td>8/19/2011</td>
<td>Approved</td>
</tr>
<tr>
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<td>ENGTSP</td>
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<td>ENGTSP</td>
<td>5676</td>
<td>MISO</td>
<td>View</td>
<td>8/21/2011</td>
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</tr>
<tr>
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<td>YKYST</td>
<td>YKY Company</td>
<td>YKYST</td>
<td>5678</td>
<td>MISO</td>
<td>View</td>
<td>8/21/2011</td>
<td>Approved</td>
</tr>
</tbody>
</table>

4.8 Balancing Authorities

The 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.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Code</th>
<th>Long Name</th>
<th>Short Name</th>
<th>NERC ID</th>
<th>Market Area</th>
<th>Contacts</th>
<th>Effective Date</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
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<td>BAB</td>
<td>Baby Balancing Area</td>
<td>BAB</td>
<td>164</td>
<td>MISO</td>
<td>View</td>
<td>8/19/2011</td>
<td>Approved</td>
</tr>
<tr>
<td>Balancing Area 2</td>
<td>BAO</td>
<td>Baby Balancing Area 2</td>
<td>BAO</td>
<td>1702</td>
<td>MISO</td>
<td>View</td>
<td>8/19/2011</td>
<td>Approved</td>
</tr>
<tr>
<td>Balancing Authority 1</td>
<td>BA1</td>
<td>Balancing Authority 1</td>
<td>BA1</td>
<td>1703</td>
<td>MISO</td>
<td>View</td>
<td>8/21/2011</td>
<td>Approved</td>
</tr>
<tr>
<td>Balancing Authority 2</td>
<td>BA2</td>
<td>Balancing Authority 2</td>
<td>BA2</td>
<td>1704</td>
<td>MISO</td>
<td>View</td>
<td>8/21/2011</td>
<td>Approved</td>
</tr>
<tr>
<td>Balancing Authority 3</td>
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<td>Balancing Authority 3</td>
<td>BA3</td>
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<td>MISO</td>
<td>View</td>
<td>8/21/2011</td>
<td>Approved</td>
</tr>
</tbody>
</table>

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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 Interchange Distribution Calculator (IDC).

A Control Zone can only be registered by a balancing authority within the territory of its operation. By default, each balancing authority must register a Control Zone whose name is identical to the name of the parent balancing authority. webRegistry will automatically create a matching Control Zone for each new balancing authority.

An Entity Administrator user for a balancing authority 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 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 BOF.

To locate Flowgates, navigate to Objects >> Flowgates.

5.3 Interconnections

Three 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. To create a new interconnection, click the “New Interconnection” button.
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.

When creating a point in webRegistry, the system will search the TSIN database to see if the point exists in TSIN. If the point is found in TSIN, the Point ID will be brought over from TSIN. If the point could not be found in TSIN, a new Point ID will be assigned. A “Load from TSIN” functionality is also available to bring available point information over from TSIN.
5.5 Products

OATI webRegistry users can view various types of products through the Product display. The display will show users the type of product, as well as the description, effective start, and effective stop dates of the product.

To locate Products, navigate to Objects >> Products. To create a new product, click on the “New Product” button.
5.6 Source/Sink Points

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

Entity Administrators for GPE entity codes can register source points in webRegistry, including the association with hosting control zones. The approval policy will be designed to require the corresponding BA to approve such registration.

Similarly, Entity Administrators for LSE entity codes can register sink points in webRegistry, including the association with hosting control zones. This will require an approval of the corresponding BA.

Entity Administrators for the balancing authorities can register source and sink points in their control zones. When registering a source/sink point, the balancing authority can select one or more GPE/LSE 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 LSE/GPE 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 LSE/GPE, 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.
5.7 MRD Flowgates

OATI webRegistry will provide the ability to record Market Re-Dispatch (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 Flowgates, navigate to Objects >> MRD Flowgates.

5.8 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.
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 will allow users to pay their annual dues directly through the system by using a major credit card.

Annual dues are based on the number of entity/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, a warning message will be sent to all users in the delinquent entity and a probation period will ensue.

If a payment is not made during the probation period, an entity registration may be terminated and result in terminations to existing data object registrations. Each termination will be made manually, on a case-by-case basis by Registry Administrators in consultation with NAESB.

Late payment charges may be assessed during the probation period.

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

Annual Payments are due on the anniversary of the first Code-Role registration. If, after paying its annual dues, an entity registers additional roles/codes, 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 summary display lists the entity’s payment history in the system.
7.1 Latest Payments

The Latest Payments page displays the latest payments posted to the system. This display shows the amount paid, as well as when the next payment is due.

To locate the latest payments, navigate to Payment >> Latest Payments. To enter a new payment, click on the “New Payment” button.
7.2 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.
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.

![Alarm Subscriptions](image)

**Alarm Subscription Information**

- **Alarm Type**: Event
- **Alarm Description**: Alarm when new Nessa item is created or modified
- **Subscription Date**: 12/04/2011 17:28:39
- **Notification Method**: Framework
- **Acknowledgment Method**: Manual
- **Framework Message**: None

**Notification Selected**

- **Email**: None
- **Page**: Page 1 of 1
- **Record**: Record 1 of 1

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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.

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 will be supported in webRegistry:

- Registry Administrator
- Entity Administrator
- Entity User
- NAESB User
- Applicant

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. Entity 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.
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.
11.3 Registry Download

This display will allow users to download data files associated with Registry publications in CSV, MDB, or XML formats.

To locate the Registry Download, navigate to Registry Management >> Registry Download. To download selected objects, click on the “Download Selected Objects” button.
12. Help Menu

12.1 Recommended Browser Settings

OATI webRegistry supports Internet Explorer 6, 7, and 8. Associated documentation guides a user through recommended browser settings for each Internet Explorer release.

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

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12.2 Registry Documentation

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

To locate documentation, navigate to Help >> Registry Documentation.