



Transmission Registry (TR) Upgrade

Welcome

Our presentation will begin shortly.

Today's Trainer:

Monica Mouanetry, Senior Customer Readiness Trainer

Updates:
Slide 5 – Update production go-live date
Slide 16 – Update production go-live date
Slide 17 – Minor slide update
Slide 18 – Added new TR production URL slide

Housekeeping



Keep yourself muted to minimize background noise



Unmute to ask verbal questions or write questions in the chat pod



Raise your hand using WebEx interactivity tools

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Agenda

This training will cover the following topics:



High-level review of changes



Application-specific details



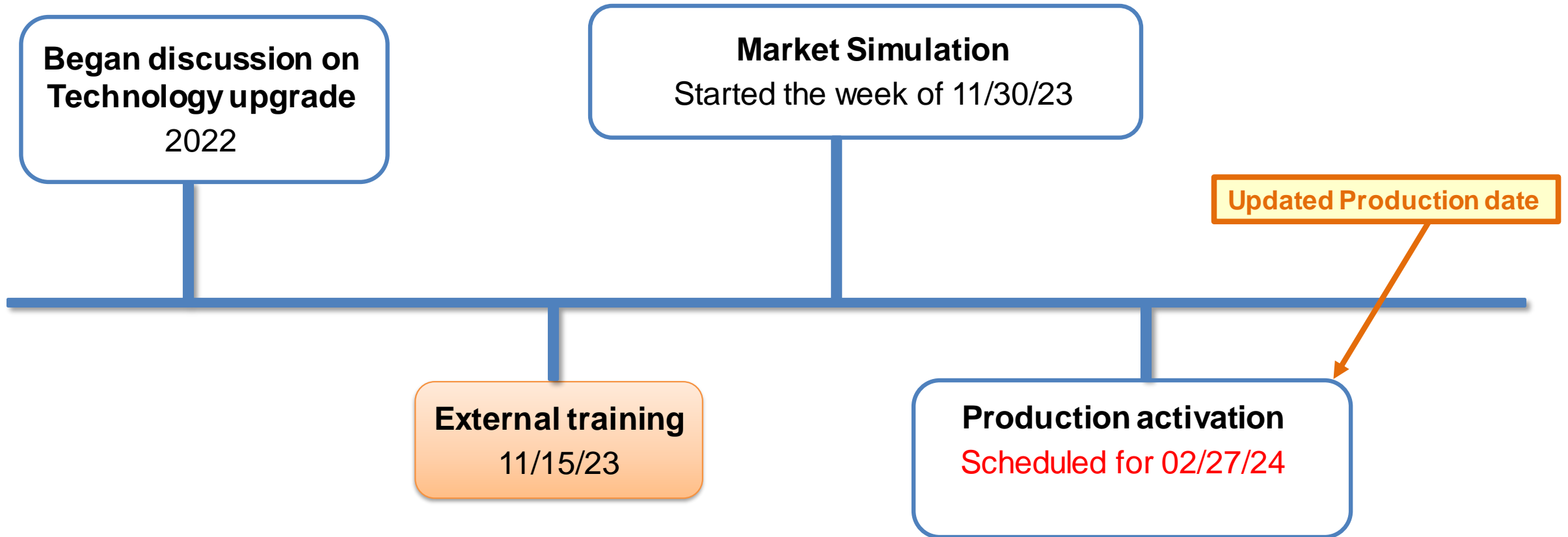
Market simulation activities





Implementation Timeline

Implementation timeline





Background: High-level review of changes

Section Focus:

- What is Transmission Registry?
- What's changing?
- Who does it impact?

Why are we here?

ISO is upgrading the current Transmission Register system due to legacy technology.

- Changes to how UAAs provision access
- New look and feel
- New testing environment

What is the ISO Transmission Registry (TR)?

Secure Web-enabled database environment for CAISO internal users and specific Participating Transmission Owners (PTO) to access TR data.



Identity of the PTO responsible for operation and maintenance and its Owners.



Dates which the CAISO assumed or relinquished Operational Control.



Date of any change in the identity of the PTO responsible for its operation and maintenance, or in the identity of its owner.



Store Transmission equipment's applicable ratings and history.

Who does this impact?

Participating Transmission Owners (PTOs)
responsible for the operation and
maintenance of the transmission assets
within the CAISO Balancing Authority (BA)

User Access Administrators (UAAs) who
provision TR access for their organization



Questions?



Provisioning Access

Section Focus:

- New method for requesting access to the TR system
- New MAP Stage environment for testing

Transmission Registry user roles

UAA



PTO Admin

Create/update TR Components, submit Change Requests, and Update Organization users that are maintained/owned/shared with their specific organization.



PTO User

Read only access to view TR components and Change Requests that are maintained/owned/shared with their specific organization.



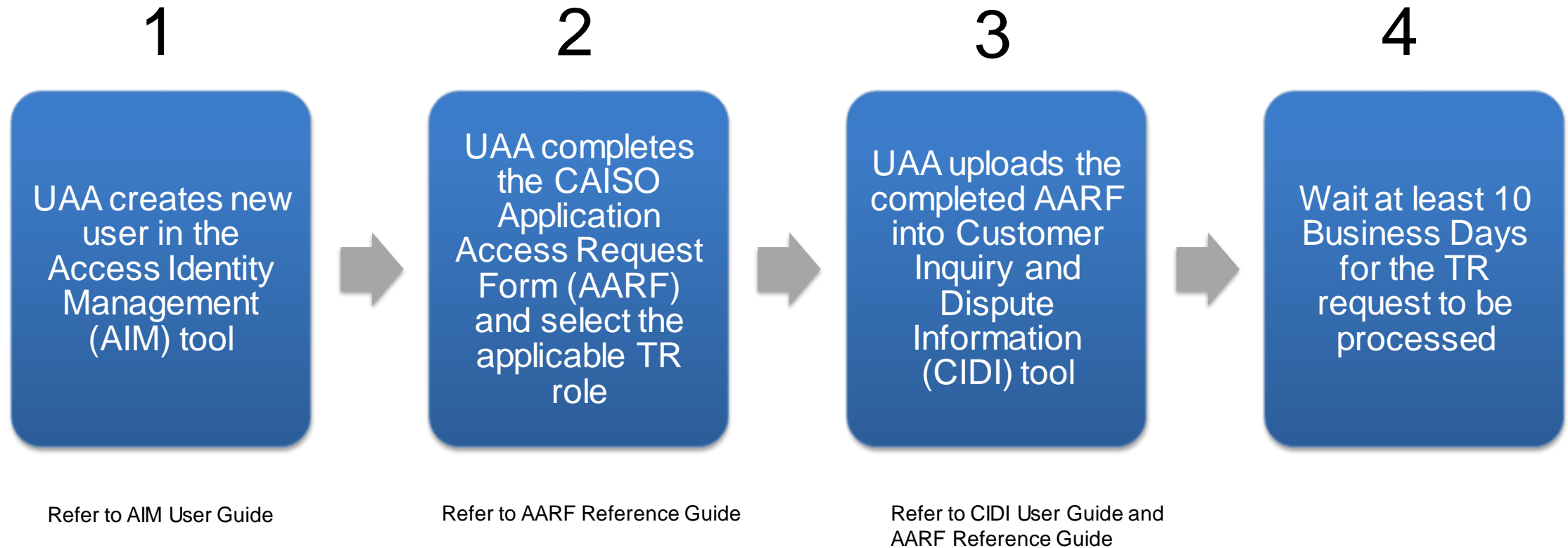
Linker

Create or remove a component links that are maintained/owned/shared with their specific organization.

- User **cannot** be provisioned for both **PTO Admin** and **PTO User** role
- User **can** be provisioned for both **PTO Admin** and **Linker**
- User **can** be provisioned for both **PTO User** and **Linker**
- **Linker** role is associated to either a **PTO Admin** and **PTO User** role but never by itself.

Current TR access request process

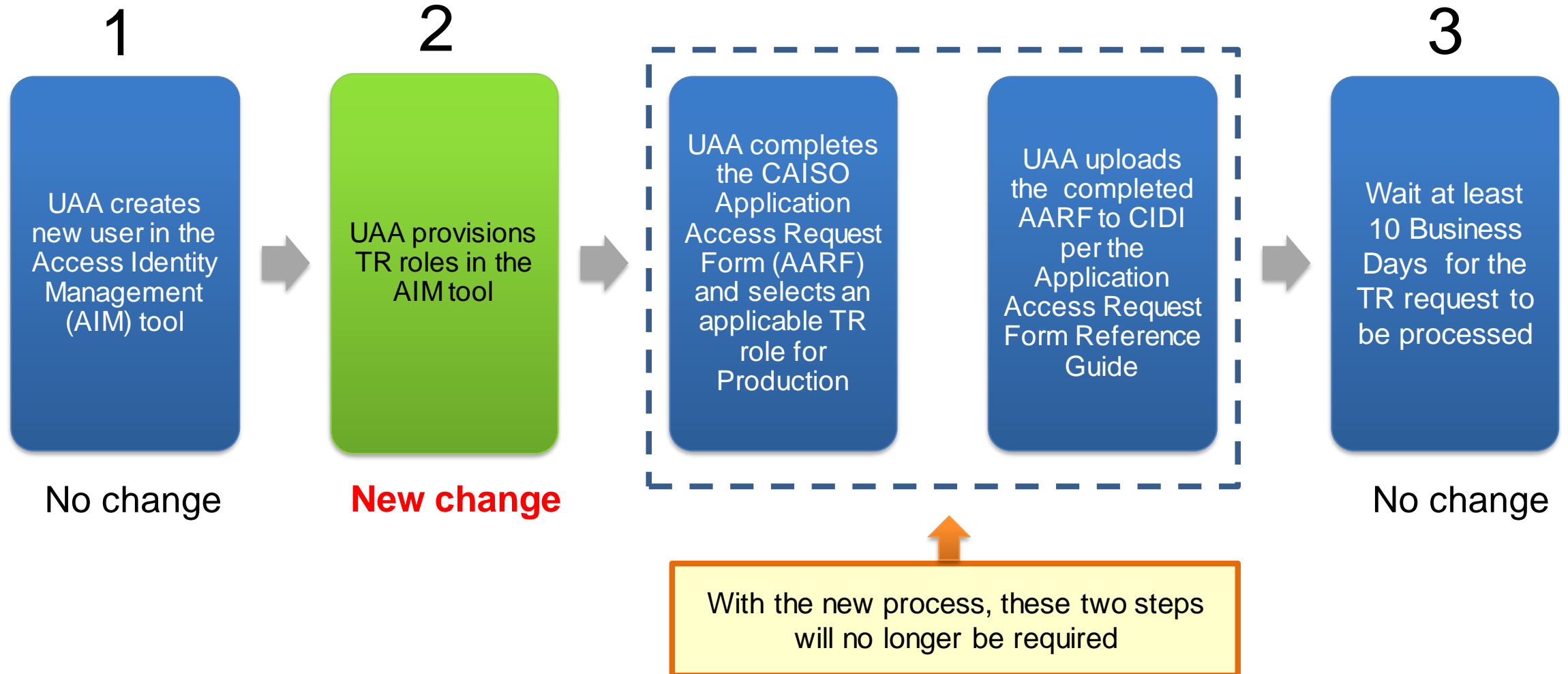
UAA



Links: [AIM User Guide](#) | [AARF Reference Guide](#) | [AARF Template](#) | [AIM Application](#) | [CIDI Application](#) | [CIDI User Guide](#)

New TR access request process

UAA



Important provisioning user access details

UAA

For **MAP Stage** environment access, UAAs have to use the **new process** in the AIM tool for TR access because the current AARF template does not have an option for MAP Stage.

For **Production** environment access, UAAs have to use the **old process** for TR access until the TR upgrade is implemented in production on **Feb 27, 2024**.

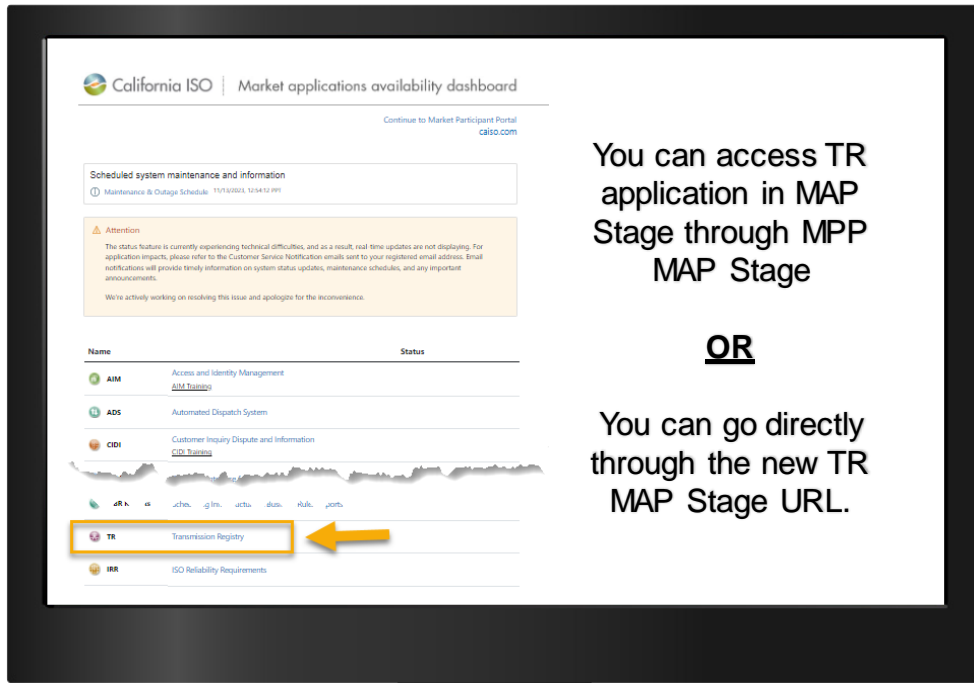
In AIM, the TR roles in Production have not been enabled for UAAs to select at this time.

For TR provisioning questions, participants can submit a CIDI inquiry ticket and put **'Transmission Registry'** in the Subject line.

[CIDI Application](#) | [CIDI User Guide](#)

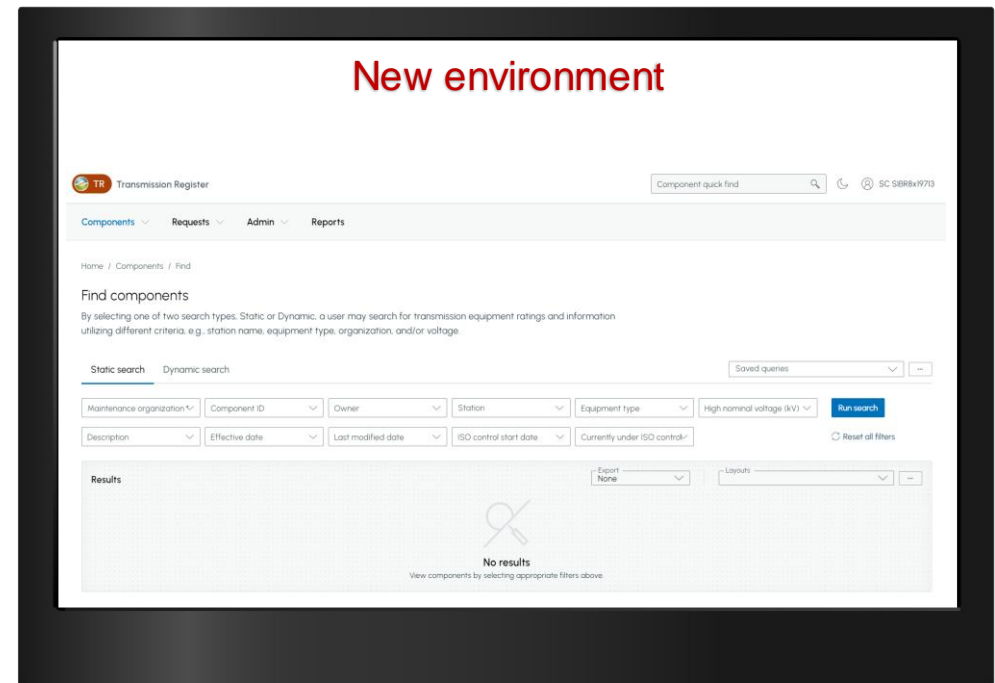
NEW TR MAP Stage environment

Market Participant Portal (MPP) in MAP Stage



https://portalmap.caiso.com/MPP_files/MPPApps.html

TR application in MAP Stage

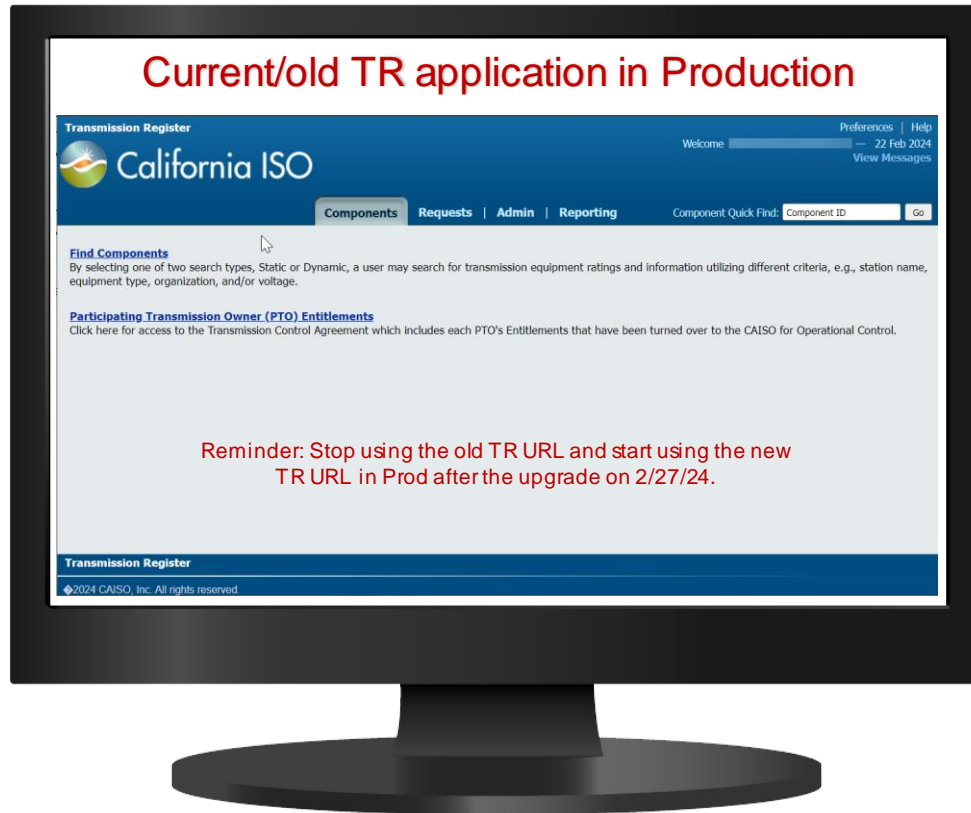


[https://mapstage-tr.caiso.com/tr/ \(New URL\)](https://mapstage-tr.caiso.com/tr/)



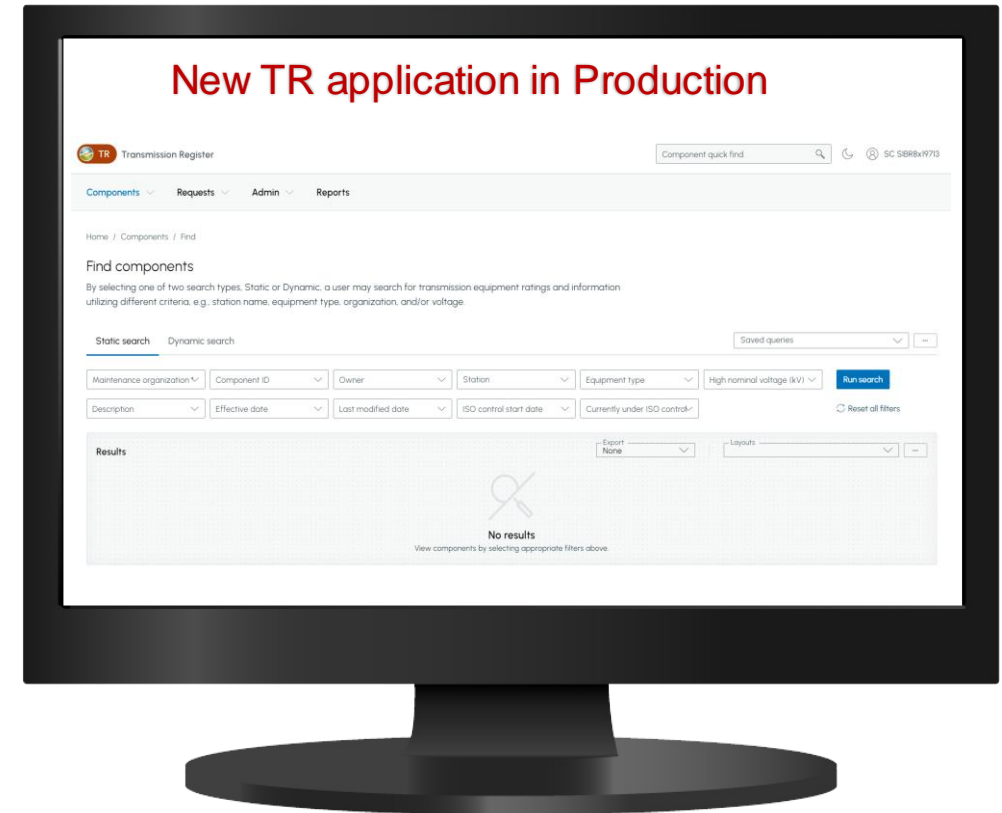
NEW TR Production URL

Transmission Registry



<https://portal.caiso.com/tr/app>

Upgraded Transmission Registry



<https://tr.caiso.com>

Note: You can also access the TR application through the MPP in Production at https://portal.caiso.com/MPP_files/MPPApps.html

Questions?



New look and feel for the Transmission Registry application

Section Focus:

- New/modified layout features
- Demo of the new TR application


New layout features

- Search filter display has been redesigned
- **'Clear'** button is now referred to as the **'Reset filter'**
- **'Preference'** and **'Help'** links have been move into the user profile icon
- Option to **'Switch to dark mode'**
- Show/Hide filters/columns
- Group columns
- View rows per page and toggle between large batches of records

Search filter section

Current/Old version

Transmission Register Preferences | Help

 View Messages

Components | Requests | Admin | Reporting Component Quick Find:

Find Components

Static Search [Dynamic Search](#)

Maintenance Organization:

Component ID:

Owner:

Station:

Equipment Type:

High Nominal Voltage (kV):

Description:

Effective Date:

Last Modified Date:

ISO Control Start Date:

Currently Under ISO Control:

The search filter section will look slightly different on the new version

Search Results

Default

ID	Organization	Station	Equipment Type	Description	High kV	Low kV	Tertiary kV	ISO	Last Modified	Effective Date	Summer Normal						Summer Emergency						Winter Normal			
											AMP Rating	MVA Rating	MVA _r High	MVA _r Low	Dur	Con	Notes	AMP Rating	MVA Rating	MVA _r High	MVA _r Low	Dur	Con	Notes	AMP Rating	MVA Rating

Search filter section

New version

Find components

By selecting one of two search types, Static or Dynamic, a user may search for transmission equipment ratings and information utilizing different criteria, e.g., station name, equipment type, organization, and/or voltage.

[Static search](#) [Dynamic search](#)

Saved queries

Maintenance organization Component ID **Owner** Station Equipment type High nominal voltage (kV)

Description Effective date Last modified date ISO control start date Currently under ISO control

Results

Export | Layouts

The new search field section design allows more landscape for the data results

View components by selecting appropriate filters above.

Modified features

PTOs

New version

The screenshot displays the Transmission Register interface. At the top right, a search bar labeled 'Component quick find' is visible. Below it, a navigation menu includes 'Components', 'Requests', 'Admin', and 'Reports'. A user profile icon is highlighted with a dashed orange box, and an arrow points to a callout box stating: 'Preferences and Help link have been moved into the profile icon'. Below the navigation, the breadcrumb 'Home / Components / Find' is shown. The main heading is 'Find components', followed by a descriptive paragraph: 'By selecting one of two search types, Static or Dynamic, a user may search for transmission equipment ratings and information utilizing different criteria, e.g., station name, equipment type, organization, and/or voltage.' The search interface includes tabs for 'Static search' and 'Dynamic search'. A 'Saved queries' dropdown is located at the top right of the search area. The search filters are arranged in two rows. The first row includes: 'Maintenance organization*' (with a dropdown menu), 'Component ID', 'Owner', 'Station', 'Equipment type', and 'High nominal voltage (kV)'. The second row includes: 'Effective date', 'Last modified date', 'ISO control start date', and 'Currently under ISO control'. A 'Run search' button is positioned to the right of the filters. Below the filters, there is an 'Export' dropdown set to 'None' and a 'Layouts' dropdown. A 'Reset all filters' button, highlighted with a dashed orange box and an arrow, is located below the 'Run search' button. A callout box points to this button with the text: 'The Clear filter button is now called Reset all filters'. The search results area shows 'No results' with a magnifying glass icon and the instruction: 'View components by selecting appropriate filters above.' A dashed orange box highlights the 'Maintenance organization*' dropdown menu, which is open to show a list of checkboxes: PGAE, SCE, SMUD, TBCB, and WASN. An arrow points from this box to a callout box at the bottom left stating: 'Some of the search filters now have checkboxes for multiple selections'.

New features

Can switch between light and **dark mode**

PTOs

New version

Find change requests

Allows the user the ability to search and view pending change requests for both new and existing components.

Reason ▾ Organization ▾ Originator ▾ Status Pending Approval Appro 5 ▾ Date created ▾ Date approved ▾ Run search

Component ▾ Equipment type ▾ Station ▾ Under ISO control ▾ Request source ▾ Reset all filters

Can Group by columns

Results

Grouped by Type ×, then by Process ×

Search

	TYPE	PROCESS ↑	EXPAND	ID	REASON	ORIGINATOR	STATUS	APPROVER	MODIFIED BY	DATE CREATED
	CREATE (1)	▼	<input type="checkbox"/>							
	UPDATE (1)	▼	<input type="checkbox"/>							

CSV export

Rows per page 20 ▾ 1-20 of 89238 |< < > >|

Can show/hide filters/columns, toggle density, and toggle full screen

Hide all Show all

- Select
- ID
- Type
- Process
- Reason
- Originator
- Status
- Approver
- Modified By
- Date Created
- Component ID

Can view rows per page

Walk-Through TR Application Demo





Readiness activities

Section Focus:

- Market Sim activities
- Summary Recap
- Action items

Market Simulation Timeline

- Participate in Transmission Registry Market Sim
 - Testing starts on **November 30, 2023**
 - Run the unstructured scenarios
 - Validate expected market sim scenario outcomes
- Market Simulation Forums are now available starting on **December 11, 2023**.
 - Information will be updated on the [CAISO Calendar](#) once the dates have been determined.

Market Sim scenarios for PTO Admin Role

Components Homepage

- Find Components under Static Search
- Find Components under Dynamic Search
- Link Components
- Add New Components

Requests Homepage

- Find Change Requests
- Find Share Components
- AutoLoad Change Requests and AutoLoad Change Requests History

Admin Screen

- View Users
- View Rating Types
- View Rating Notes

[Transmission Registry User Manuals](#)

Market Sim scenarios for PTO User Role

Components Homepage

- Find Components under Static Search
- Find Components under Dynamic Search
- Link Components (for Linker role)

[Transmission Registry User Manuals](#)

Market Simulation Questions?

Submit questions and/or concerns through the CIDI application or email MarketSim@caiso.com.

For the **Functional Environment**, select 'Market Simulation'

For the **Subject** line, include the keyword, '**Transmission Registry**'

CONTACT CUSTOMER SUPPORT
TELL US HOW WE CAN HELP

* SCID



Review for Price Correction



Manual Reference Level Change Request

* Functional Environment

- None--
- Production
- Market Simulation**
- Release
- RC Integration
- RC Shadow Operations
- Parallel Operations
- request

Questions?

Summary Recap

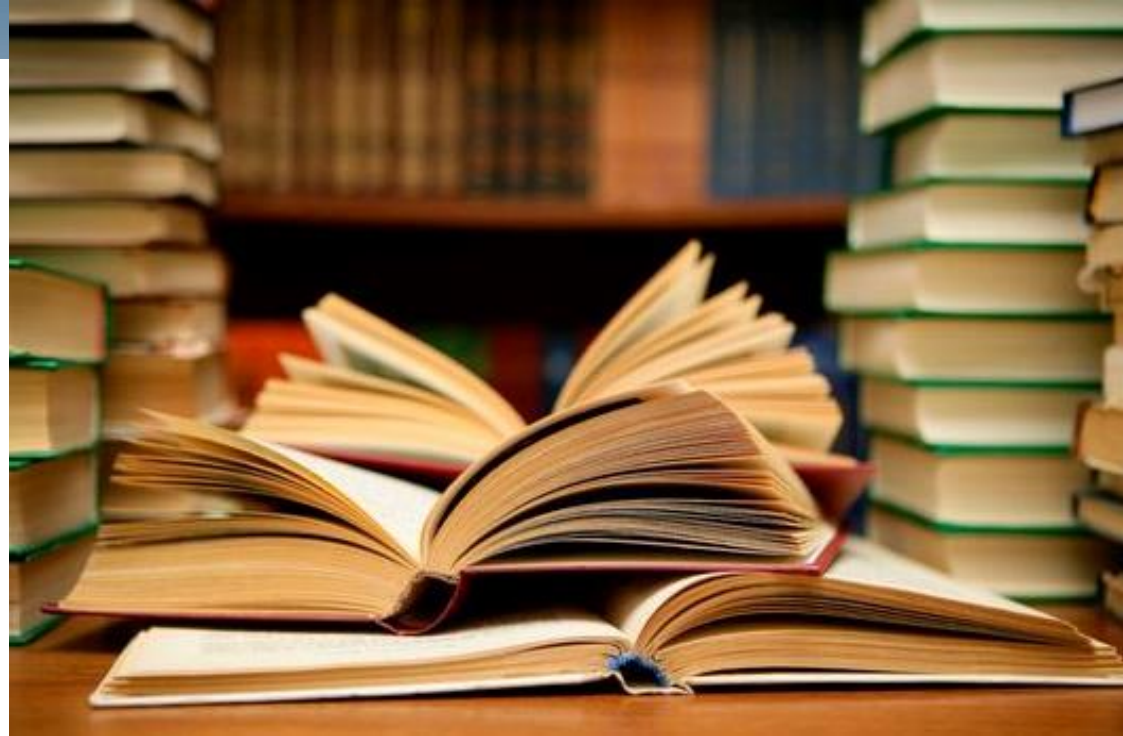
- Reason for the upgrade
- Who is impacted
- Provisioning update
- New MAP Stage environment
- New look and feel
- Market Sim activities



Action Items

- Coordinate with your UAA to obtain access to MAP Stage for TR
- Validate access to the new TR MAP Stage environment
- Review the updated user manuals
- Test the new screens based on your TR role in the unstructured Market Simulation environment





Reference Materials

Reference Links

Transmission Control Agreements:

[Transmission Control Agreement ISO Register NDA](#)

[Transmission Control Agreements ISO Register Screening Process V2](#)

User Manuals: Click '[here](#)' to view the documents

- Transmission Register PTO Administrator User Manual
- Transmission Register Component Linking Manual
- Transmission Register Autoloader User Manual
- Transmission Register California ISO and PTO General User Manual

User Interface Environments

MAP Stage: <https://mapstage-tr.caiso.com/tr/> (New)

Prod: <https://tr.caiso.com> (New)





Thank you for your participation!

For more detailed information on anything presented, please visit our website at: www.caiso.com or send an email to: CustomerReadiness@caiso.com.

For resource specific questions or concerns, please submit a CIDI ticket.