Welcome
Our presentation will begin shortly.

Today’s Trainer:
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Transmission Registry (TR) Upgrade

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

- **Began discussion on Technology upgrade**
  - 2022

- **Market Simulation**
  - Started the week of 11/30/23

- **External training**
  - 11/15/23

- **Production activation**
  - Scheduled for 02/27/24

- Updated Production date
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

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.
Transmission Registry user roles details

• 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

1. UAA creates new user in the Access Identity Management (AIM) tool
   - Refer to AIM User Guide

2. UAA completes the CAISO Application Access Request Form (AARF) and select the applicable TR role
   - Refer to AARF Reference Guide

3. UAA uploads the completed AARF into Customer Inquiry and Dispute Information (CIDI) tool
   - Refer to CIDI User Guide and AARF Reference Guide

4. Wait at least 10 Business Days for the TR request to be processed

New TR access request process

1. UAA creates new user in the Access Identity Management (AIM) tool
2. UAA provisions TR roles in the AIM tool
3. UAA uploads the completed CAISO Application Access Request Form (AARF) and selects an applicable TR role for Production

With the new process, these two steps will no longer be required
Important provisioning user access details

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

You can access TR application in MAP Stage through MPP.

OR

You can go directly through the new TR MAP Stage URL.

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

TR application in MAP Stage

https://mapstage-tr.caiso.com/tr/ (New URL)
NEW TR Production URL

Transmission Registry

Current/old TR application in Production

Reminder: Stop using the old TR URL and start using the new TR URL in Prod after the upgrade on 2/27/24.

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

Upgraded Transmission Registry

New TR application in Production

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
The search filter section will look slightly different on the new version.
The new search field section design allows more landscape for the data results.

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.
New version

PTOs

- Preferences and Help link moved into profile icon
- Clear filter button now called Reset all filters
- Some search filters have checkboxes for multiple selections

Modified features

- Search filter layout expanded horizontally
- Reset filter button (Clear button)
- Preference link relocated
- Switch to dark mode
New features

Can Group by columns

Can switch between light and **dark mode**

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

Can view rows per page

PTOs

New version
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’
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.