Transmission Registry (TR) Upgrade

Today's Trainer:
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Updates:
Slide 5 – New Market Sim date
Slide 12 – Clarified user roles
Slide 27 – New Market Sim start date
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  
Starts on 11/30/23

External training  
11/15/23

Production activation  
Tentatively scheduled for January 2024

Updated Market Sim start 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
   - No change

2. UAA provisions TR roles in the AIM tool
   - New change

3. UAA completes the CAISO Application Access Request Form (AARF) and selects an applicable TR role for Production
   - No change

   UAA uploads the completed AARF to CIDI per the Application Access Request Form Reference Guide
   - No change

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

   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 (Jan 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](#)
Accessing TR in Production

Market Participant Portal (Production)

Transmission Registry (Production)

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

https://portal.caiso.com/tr/app
NEW MAP Stage environment

Market Participant Portal (MAP Stage)

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

Transmission Registry (MAP Stage)

https://mapstage-tr.caiso.com/tr/
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
Modified features

New version

- Search filter layout expanded horizontally across the page to allow more room for data records
- Reset filter button (clear button)
- Preference link relocated
- Switch to dark mode

Preferences and Help link have been moved into the profile icon

The Clear filter button is now called Reset all filters

Some of the search filters now have checkboxes for multiple selections
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
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, 2024
  – 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 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
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.