Welcome

Today’s Trainer:
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Transmission Registry (TR) Upgrade

Updates:
Slide 5 – New Market Sim date
Slide 12 – Clarified user roles
Slides 14-16 – Added process clarification
Slide 27 – New Market Sim 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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This training will cover the following topics:

1. High-level review of changes
2. Application-specific details
3. Market simulation activities
Implementation Timeline
Implementation timeline

Began discussion on Technology upgrade 2022

Market Simulation
Starts the week of 11/27/23

External training
11/15/23

Production activation
Tentatively scheduled for January 2024

Update: Market Sim has been rescheduled
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
Update TR components and submit 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

2. UAA completes the CAISO Application Access Request Form (AARF) and select the applicable TR role

3. UAA uploads the completed AARF into Customer Inquiry and Dispute Information (CIDI) tool

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

   UAA completes the CAISO Application Access Request Form (AARF) and selects an applicable TR role for Production

   UAA uploads the completed AARF to CIDI per the Application Access Request Form Reference Guide

3. Wait at least 10 Business Days for the TR request to be processed
   - No change

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)

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

Transmission Registry (Production)

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

Market Participant Portal (MAP Stage)

Transmission Registry (MAP Stage)

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

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
Search filter section

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

Some of the search filters now have checkboxes for multiple selections

The Clear filter button is now called Reset all filters
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

New version
Readiness activities

Section Focus:
- Market Sim activities
- Summary Recap
- Action items
Market Simulation Timeline

• Participate in Transmission Registry Market Sim
  – Testing starts the week of **November 27, 2024**
  – Run the unstructured scenarios
  – Validate expected market sim scenario outcomes

• Market Simulation Forums are scheduled - **TBD**
  – Information will be updated on the [CAISO Calendar](#) once the dates have been determined.

Update: Market Sim has been rescheduled
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:**
- 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/](https://mapstage-tr.caiso.com/tr/) (New)
Prod: [https://tr.caiso.com](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.