



# Transmission Registry (TR) Upgrade

## Welcome

*Today's Trainer:*

*Monica Mouanetry, Senior Customer Readiness Trainer*

# 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



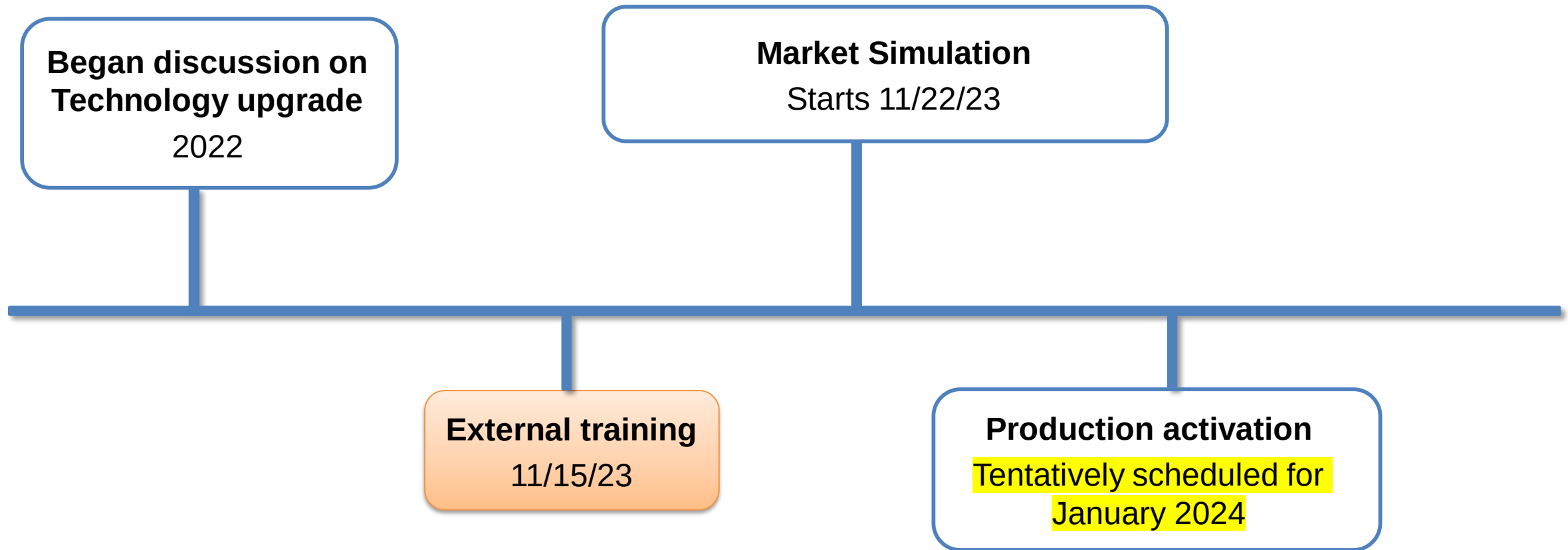
Market simulation activities





## 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

Allow users to **manage/modify/report and view all TR Components** that are maintained/owned by/shared with their specific organization.



PTO User

Allow users to **create/view/update TR components and submit change requests** maintained/owned by/shared with their specific organization.



Linker

Allow users to **create or remove a component link** maintained/owned by/shared with their specific organization.

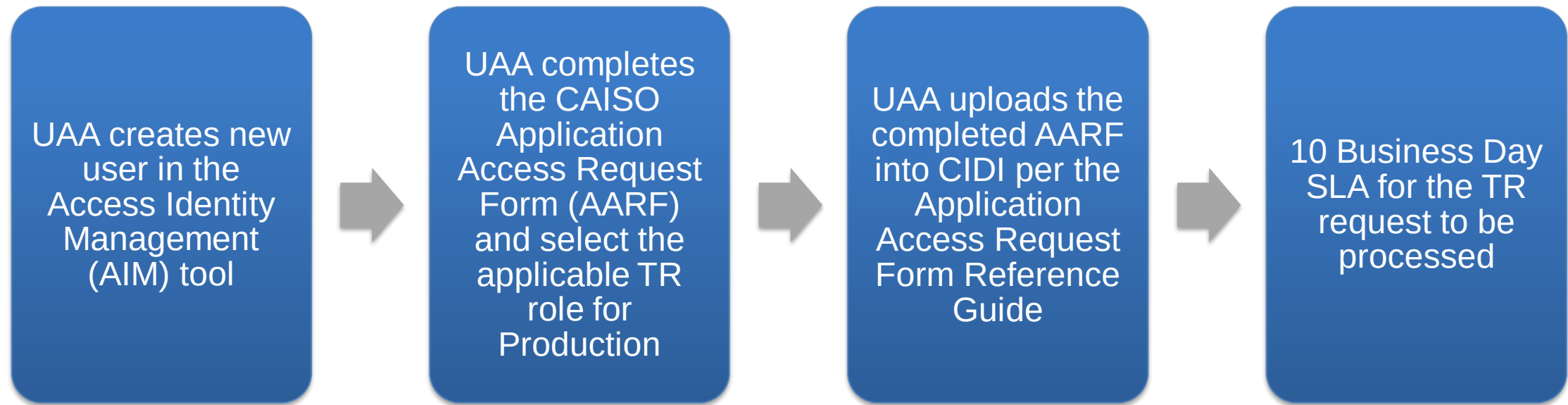
# Transmission Registry user roles details

UAA

- User cannot have both PTO Admin and PTO User role
- User can have both PTO Admin and Linker
- User can have both PTO User and Linker

# Current TR access request process

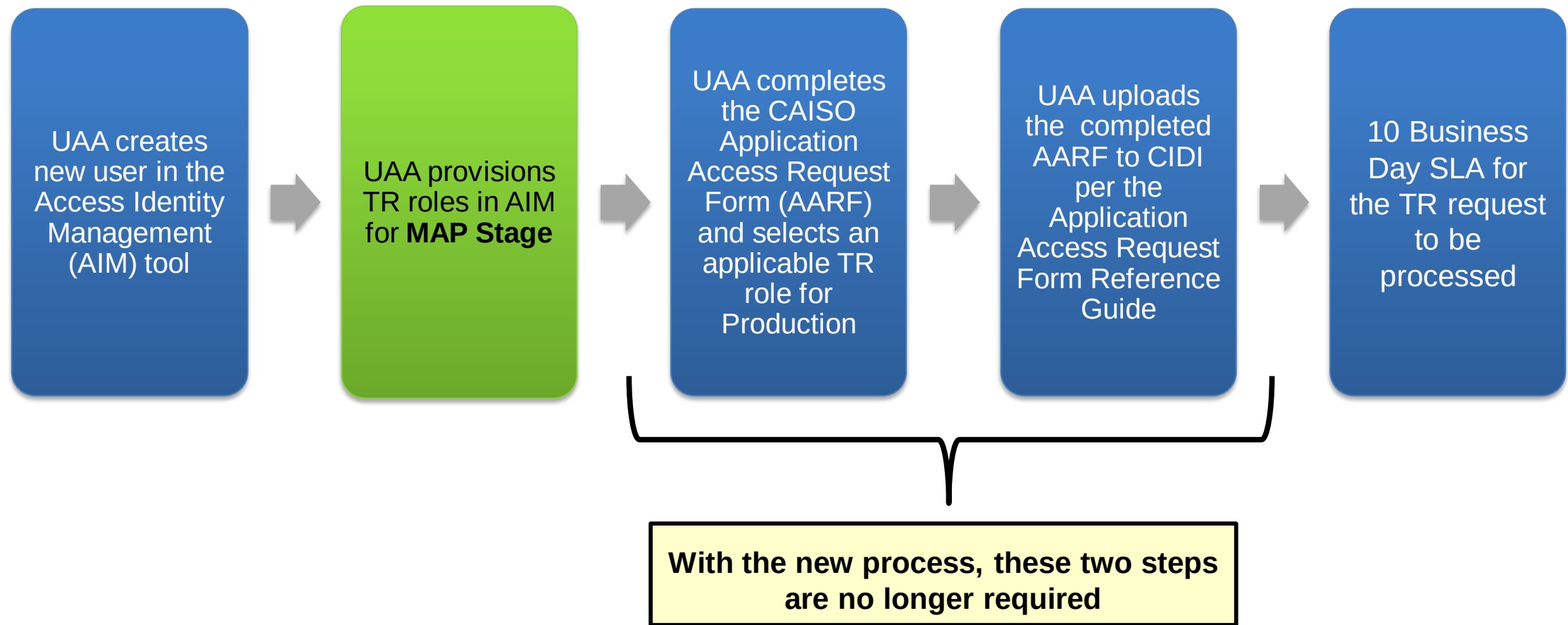
UAA



Links: [AIM User Guide](#) | [Application Access Request Form](#) | [AIM Application](#) | [CIDI Application](#)

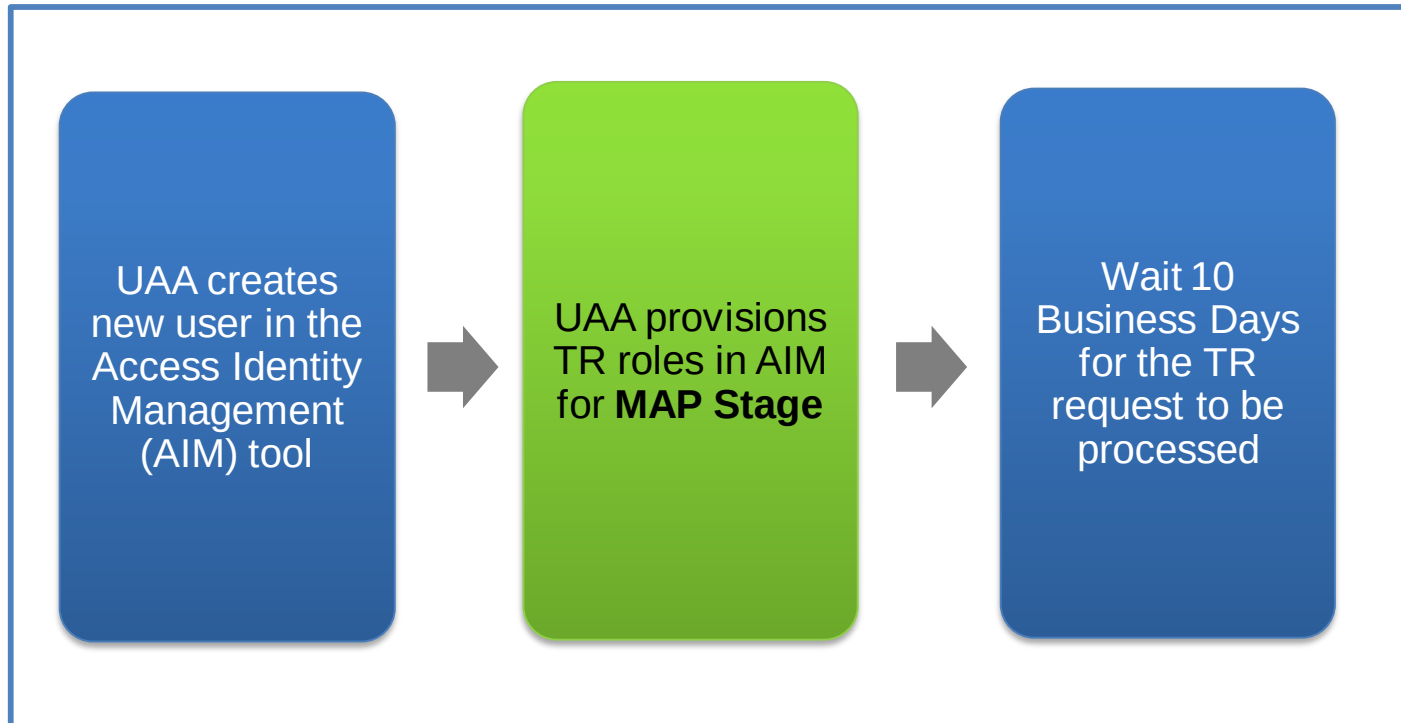
# New TR access request process

UAA



# New TR access request process in MAP Stage

UAA

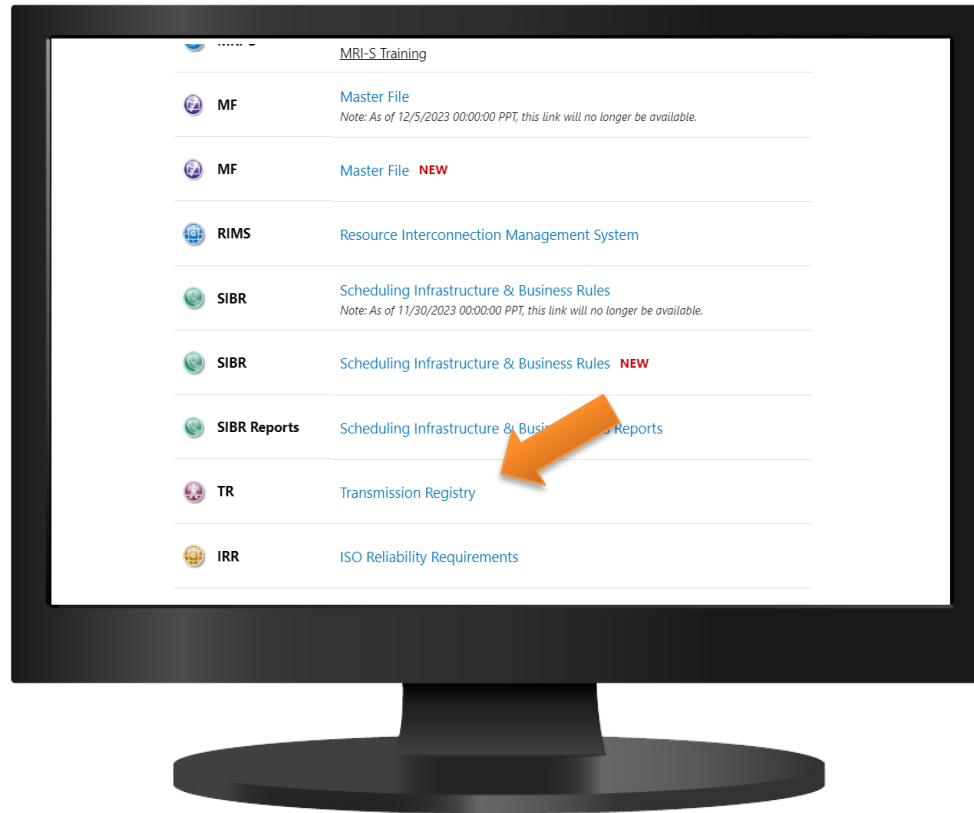


UAA should not submit an access request for the same user through the old and new submission process at the same time.



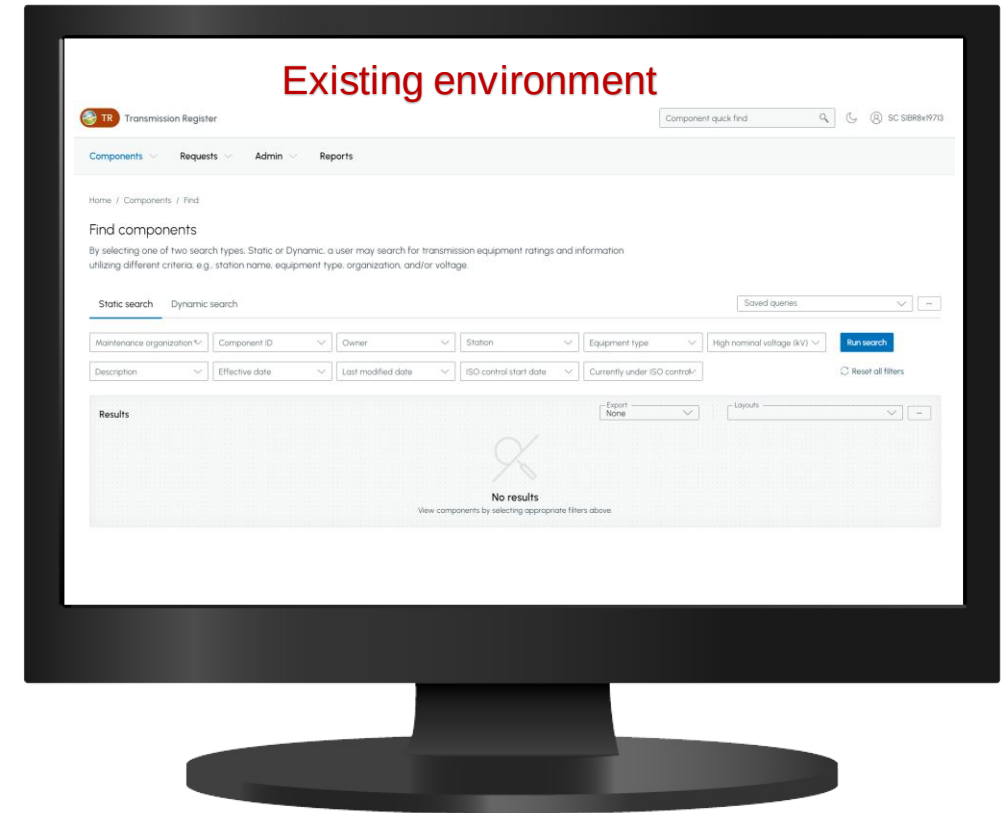
# Accessing TR in Production

## Market Participant Portal (Production)



[https://portal.caiso.com/MPP\\_files/MPPApps.html](https://portal.caiso.com/MPP_files/MPPApps.html)

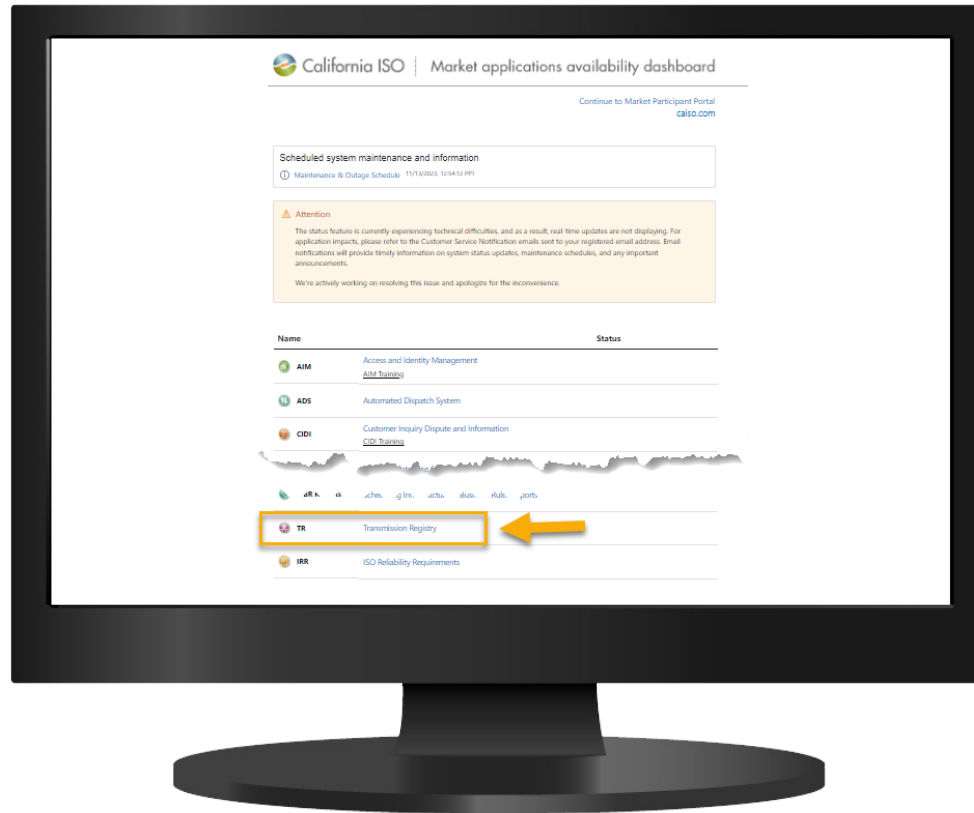
## Transmission Registry (Production)



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

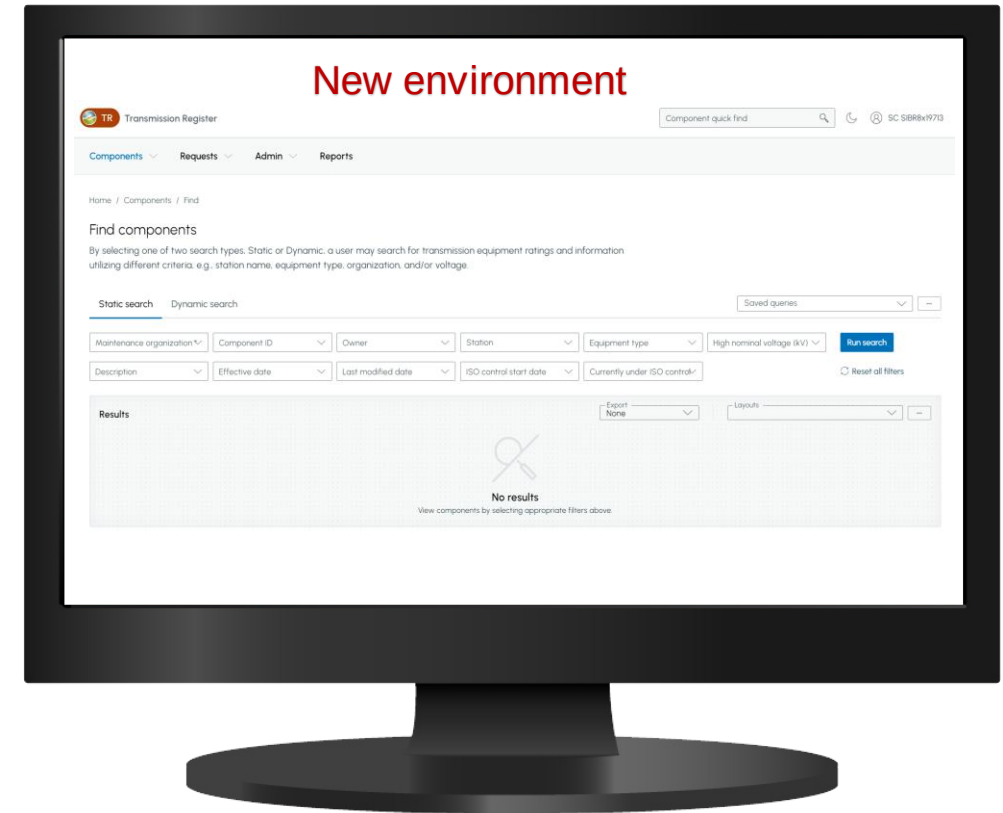
# NEW MAP Stage environment

## Market Participant Portal (MAP Stage)



[https://portalmap.caiso.com/MPP\\_files/MPPApps.html](https://portalmap.caiso.com/MPP_files/MPPApps.html)

## Transmission Registry (MAP Stage)



<https://mapstage-tr.caiso.com/tr/>

# Questions?



Changes to the new look and feel

# Layout changes or 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 filters

Transmission Register

California ISO

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:

Search Results

Default

[Modify Layout](#) [Manage Layouts](#) [CSV Export](#) [Autoloader Export](#)

| 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 High | MVA Low | Dur | Con | Notes            | AMP Rating | MVA Rating | MVA High | MVA Low | Dur | Con           | Notes | AMP Rating | MVA Rating |

California ISO

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# Search filters

## 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](#) **The search have been redesigned to allow more landscape for the data results**

Saved queries 



Maintenance organization 

Component ID 

Owner 

Station 

Equipment type 

High nominal voltage (kV) 

Run search

Description 

Effective date 

Last modified date 

ISO control start date 

Currently under ISO control 

 Reset all filters

Results

Export 

None 

LAYOUTS 







No results

View components by selecting appropriate filters above.

# Modified features

Preferences and Help link have been moved into the profile icon

Home / Components / Find

## 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

Maintenance organization \* ▾  

☐ PGAE  
☐ SCE  
☐ SMUD  
☐ TBCB  
☐ WASN

Component ID ▾

Owner ▾

Station ▾

Equipment type ▾

High nominal voltage (kV) ▾

Run search

Effective date ▾

Last modified date ▾

ISO control start date ▾

Currently under ISO control ▾

Reset all filters

Saved queries ▾

...

Export None ▾

Layouts ▾

...

No results

View components by selecting appropriate filters above.

Some of the search filters have checkboxes for multiple selections

The Clear filter button is now called Reset all filters



# New features

Allows users to switch between light and **dark mode**

 **Transmission Register**

Component quick find





 SC SIBR8x19713

Components

Requests

Admin

Reports

Home / Requests / FindChangeRequests

## 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 ID

High nominal voltage (kV)

Equipment type

Station

Under ISO control

Request source

Reset all filters

Results

Group by columns

CSV export

Grouped by Type, then by Process

Search

TYPE

PROCESS

EXPAND

ID

REASON

ORIGINATOR

STATUS

APPROVER

MODIFIED BY

DATE CREATED

CREATE (1)

UPDATE (1)

Rows per page 20

1-20 of 89238



# Readiness activities

## Section Focus:

- Market Sim activities
- Summary Recap
- Action items

# Market Simulation Timeline

- Participate in Transmission Registry Market Sim
  - Testing starts **Wednesday, November 22, 2023**
  - 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.

# 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](mailto: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

Release

--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

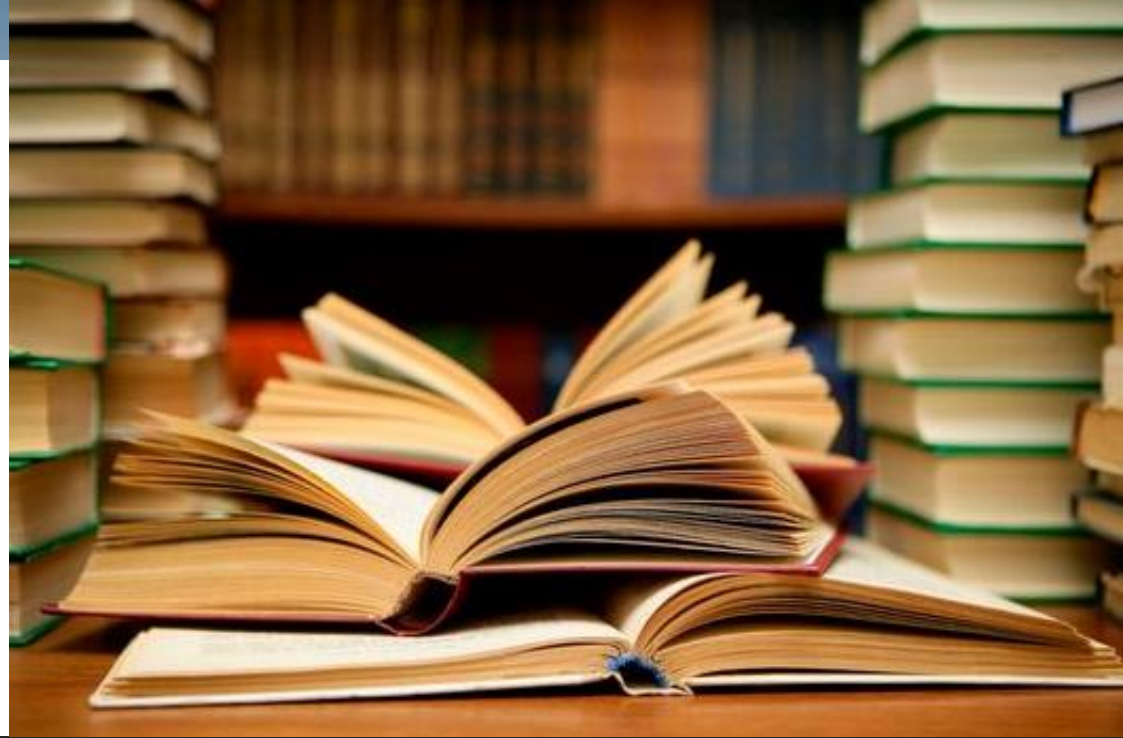




# Action Items

- ☐ 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:

[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](http://www.caiso.com) or send an email to: [CustomerReadiness@caiso.com](mailto:CustomerReadiness@caiso.com).

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