eDART March 2014 Release Enhancements

eDART XML Users Group Meeting
03/17/2014
• Production
  – Release of enhancements scheduled for Wednesday, March 26th.

• Sandbox
  – Release of enhancements scheduled for Monday, March 17th.
Overview

- Changes to Account Registration Process
  - March 2014 Enhancements
  - Future Enhancements
  - Question & Answer Resolution Session
Changes to Account Registration Process
The Account Registration Process will be undergoing changes to both increase security and better manage eDART Users.

- eDART Member Registration Form changes:
  - Look and feel updated.
  - Ability to add more than 5 users.
  - Password field will be removed. The CAM for the new account will be given a temporary password which the user is required to change. Temporary password will remain active for 4 hours.
Account Registration Process

• eDART Member Registration Form changes (cont’d):
  – CEII approval required for Transmission Edit or Read Only access requests. Link to CEII Request Form to be added to registration form.

• CAM re-certification process to include notification of eDART users inactive for 12 or more months. CAM would need to verify users to prevent account from being revoked.
Account Registration Process

eDART Registration Form

To register users for eDART, complete this form then select "Submit." For assistance on filling out this form, please review the online help.

Required
- Please select your member company name below.
- If your company is not in the list below, please select other and fill in the appropriate name.

Authorized Contact
- First Name:
- Last Name:
- Email:
- Phone:
- City:
- State:
- Zip Code:
- Select Member Company:

The above contact person is:
- Contact Person for Generation Access to eDART
- Contact Person for Transmission Access to eDART
- Contact Person for Generic Access

User 1
- Registration Change:
- User ID:
- Password:
- Verify Password:
- Application Type:
- Access Type:
- Transmission Outage Tickets:
- Generic User:

User 2
- Registration Change:
- User ID:
- Password:
- Verify Password:
- Application Type:
- Access Type:

Contact Information
- Select member company:
- Company:
- Address Line 1:
- City:
- State:
- Zip code:

User 1
- Registration change:
- Name:
- User ID:
- Password:
- Verify Password:

Energy Market
- Application and Access Type:
- Generation outage tickets:
- Transmission outage indicator:
- Generic user:

Reliability Pricing Model
- Financial Transmission Rights:
- Auxiliary Services:
- Demand Response:
- Market Settlements:
- Financial Credit:
- Compliance:
- Transmission Service:

Add New User | Submit
Questions
Overview

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March 2014 Enhancements
• Currently, transmission tickets with cranking path facilities can only have Review Needed = N/A if:
  – Emergency = FALSE & Cut-In = FALSE & Outage Duration ≤ 30 days.

• Additional logic to allow Review Needed = N/A for short duration emergency outage:
  – Emergency = TRUE & Cut-In = FALSE & Outage Duration ≤ 5 days.
• An error message will be displayed when a ticket requires Restoration Plan Review and `<restplanreview>na</restplanreview>` is submitted.

```
<?xml version="1.0" encoding="utf-8" ?>
- <edartreply>
  - <ticket_info>
    <company_ticket_id>TEST12345678</company_ticket_id>
    <error>Restoration Plan Review Needed cannot be N/A.</error>
    <error>Ticket rejected</error>
  </ticket_info>
</edartreply>
```
Auto Reclose Ticket Warning

- Warning displayed if auto-reclose data is submitted for a non auto-reclose ticket.
- Ticket submission is still successful.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<edartreply>
  <ticket_info>
    <pjm_ticket_id>213187</pjm_ticket_id>
    <company_ticket_id>Test JP 0313142</company_ticket_id>
    <warning>AutoReclose data not saved when uploaded for a non-autoreclose ticket</warning>
    <message>Transmission ticket upload</message>
    <message>success</message>
    <executionTimestamp>2014-03-13 13:56:30</executionTimestamp>
  </ticket_info>
</edartreply>
```
Transmission Users now able to download generation cause list via browserless interface.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<edart>
  <generation>
    <cause_list>
      <cause_type>
        <cause_id>2</cause_id>
        <cause_text>Annual Inspections</cause_text>
      </cause_type>
      <unit_type_list>
        <unit_type>Diesel/CT</unit_type>
        <unit_type>Steam/Fossil</unit_type>
        <unit_type>Hydro</unit_type>
        <unit_type>Wind</unit_type>
      </unit_type_list>
    </cause_list>
  </generation>
</edart>
```
• Currently, OPD staff manually send existing ticket information when TO is granted notification rights to facilities.

• New automated process to send email notification of tickets for facilities TO is granted access to.
  – Denied, Cancelled, or Completed tickets excluded.
  – Ticket information sent in password-encrypted PDF.
  – The company’s email address must be verified to receive the new automatic email.
TERM Equipment Report Download

- TERM Equipment Rpt. download will be changed to include transmission facilities as well.
  - Previously only included TERM facilities where the TO had ownership rights.
  - Sample available at:
    - http://www.pjm.com/pub/etools/edart/xmldocs/term equip.xml
  - No changes needed for new download.
Currently TERM browserless download only returns tickets for company owned facilities.

‘shownotify’ parameter added to include tickets for facilities where TO has notification rights.

Example:
- start=12/22/2013 stop=12/23/2013 shownotify=true
  - Will return all tickets for owned and notification facilities between these start and stop dates.
- id=all shownotify=true
  - Will return all tickets for owned and notification facilities.
Non Existent Ticket Id Error

- Removal of system error displayed for invalid `<pjm_ticket_id>` or `<company_ticket_id>` submitted via genticrevise.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<edartreply>
  <error>An ERROR occurred. Reference error number 408043 when you call the HELPDESK at (610)-666-8886.</error>
  <ticket_info>
    <pjm_ticket_id>1345679</pjm_ticket_id>
    <error>Your supplied ticketID of 1345679 does not exist</error>
    <error>TIcket rejected</error>
  </ticket_info>
</edartreply>

<?xml version="1.0" encoding="utf-8" ?>
<edartreply>
  <ticket_info>
    <pjm_ticket_id>123456789</pjm_ticket_id>
    <error>Your supplied ticketID of 123456789 does not exist</error>
    <error>TIcket rejected</error>
  </ticket_info>
</edartreply>
```
• eDART Login Warning is being changed to match the PJM standard Login warning (as approved by the PJM Legal department).
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Future Enhancements

• **Generator Owner Notification**
  – Notification of Approved tickets with expired Est. Start Date.
  – Notification of Active tickets with expired Est. End Date.

• **Flow Breaker Implementation.**
  – Adding and monitoring ratings on CBs.

• **RXB Ticket Clean Up.**
  – New UI, improved ticket functionality.
• Addition of Voltage Limits.
  – New application similar to TERM/RXB.

• Inclusion of long station names.
  – ENDA/ENDB stations already available.

• Conflict Analyzer Phase 3A/3.
  – Inclusion of external outages in conflict analyzer logic.
  – Recommend outage scheduling windows.
• Replace and consolidate current methods of capturing CB ratings in TERM.
  – Dummy SDs
  – Manual 03
  – Incorporate into other device rating.
• Looking for CB ratings data to determine scope.
• Target implementation – Sept 2014
  – Will function like other equipment in TERM.
  – More detailed information to be provided at next DMS.
Changes to NERC-TADS Reports

- Updates to NERC-TADS downloads on Transmission Tickets to reflect changes to webTADS forms.
- The sharedCommonStructure tag will be removed from the trasnticreview download, transcreate upload and transticrevise upload.

```
- <nerctads>
  - <autoReclose>
    - <sharedCommonStructure>false</sharedCommonStructure>
      <faultType>1</faultType>
      <outageInitCode>4</outageInitCode>
      <initCauseCode>4</initCauseCode>
      <sustainedCauseCode>4</sustainedCauseCode>
      <outageModeCode>3</outageModeCode>
  </autoReclose>
</nerctads>
```
nerc-tads 4.1 report

• Remove:
  – VoltageClassCodeName
  – SubstationTerminalName1
  – SubstationTerminalName2
  – SubstationTerminalName3
  – OHUGName
  – SharedCommonStructureFlag

• Add:
  – TimeZoneCode
NERC-TADS 4.2 Report

• Remove:
  – VoltageClassCodeName
  – SubstationTerminalName1
  – SubstationTerminalName2
  – SubstationTerminalName3
  – OHUGName
  – NoElement_1

• Add:
  – TimeZoneCode
• Remove:
  – VoltageClassCodeName
  – SubstationTerminalName1
  – NoElement_1
  – NoElement_2
  – NoElement_3
  – NoElement_4

• Add:
  – TimeZoneCode
• Remove:
  - VoltageClassCodeName
  - SubstationTerminalName1
  - SubstationTerminalName2
  - SubstationTerminalName3
  - OHUGName

• Add:
  - TimeZoneCode
• Remove:
  – VoltageClassCodeName
  – SubstationTerminalName1
  – SubstationTerminalName2
  – SubstationTerminalName3
  – OHUGName

• Add:
  – TimeZoneCode

<?xml version="1.0" encoding="UTF-8" standalone="true"?>
<NADCOOutageList xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <NADCOOutage>
    <OutageIDCode>12345</OutageIDCode>
    <VoltageClassCodeName>500-599 kV</VoltageClassCodeName>
    <SubstationTerminalName1>TEST</SubstationTerminalName1>
    <SubstationTerminalName2>NA</SubstationTerminalName2>
    <SubstationTerminalName3>NA</SubstationTerminalName3>
    <ElementIdentifierName>TEST1-TEST2</ElementIdentifierName>
    <OHUGName>OH</OHUGName>
    <NAOutageType>Operational</NAOutageType>
    <OutageStartDT>03/27/2014 00:00</OutageStartDT>
    <OutageDurationNbr>96:00</OutageDurationNbr>
    <PlannedCauseCodeName>NA</PlannedCauseCodeName>
    <OperationalCauseCodeName>System Operation</OperationalCauseCodeName>
    <ContinueOutageFlag>0</ContinueOutageFlag>
  </NADCOOutage>
</NADCOOutageList>

<?xml version="1.0" encoding="UTF-8" standalone="true"?>
<NADCOOutageList>
  <NADCOOutage>
    <OutageIDCode>12345</OutageIDCode>
    <ElementIdentifierName>TEST1-TEST2</ElementIdentifierName>
    <NAOutageType>Operational</NAOutageType>
    <OutageStartDT>03/27/2014 00:00</OutageStartDT>
    <TimeZoneCode>EPT</TimeZoneCode>
    <OutageDurationNbr>96:00</OutageDurationNbr>
    <PlannedCauseCodeName>NA</PlannedCauseCodeName>
    <OperationalCauseCodeName>System Operation</OperationalCauseCodeName>
    <ContinueOutageFlag>0</ContinueOutageFlag>
  </NADCOOutage>
</NADCOOutageList>
• Remove:
  – VoltageClassCodeName
  – SubstationTerminalName1
• Add:
  – TimeZoneCode
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