Network Integration (NT) Transmission Service TSR Procedures

BPA Transmission Business Practice

Version 2

2/6/2018

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Note: The OATI system screenshots included in this document are proprietary and not to be used outside the context of this document. Do not distribute without specific authorization from OATI. A draft Version 1 was posted on the Transmission Business Practice page on Mar. 1, 2017. The final version was posted on Mar. 9, 2017.

For more information, visit the BPA Transmission Business Practices page or submit questions to techforum@bpa.gov.

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A. LTF NT TSR Submittal

Log into webSmartOASIS.

Click Transactions and then click Reservation Summary.

Click the New TSR icon [icon]. The New TSR screen will display.

In the TSR Information section:

a. Click the drop-down menu of the Service field to choose the service type.

b. Click the drop-down menu of the Request Type field to choose the request type.

    i. To submit a new TSR, a LTF Transfer TSR, or a Conformance TSR choose ORIGINAL.

    ii. To renew existing service choose RENEWAL.

    iii. LTF NT TSRs may not be Redirected or Deferred.

c. Click the drop-down menu of the SOURCE and SINK fields to choose the SOURCE and SINK.

d. Click the drop-down menu of the POR and POD fields to choose the POR and POD.

e. Click Preconfirmed (optional unless you are submitting a Conformance or Competition TSR).

f. Leave the Path drop-down field blank.

In the Reservation Profile section:

g. Type the Start and Stop Time for the TSR

h. Change the Start/Stop Time to display 00.

i. Verify the time zone is correct.

Type the desired MW for the TSR in MW field.

    Note: NT TSRs may be profiled.

Click the Get Price button; the price will automatically populate.

In the References/Comments/Notifications section:

j. Click the drop-down Sale Ref menu to choose your 5-digit contract number.

k. If you are submitting a Conformance, LTF Transfer, or a Competition TSR, type the Assign Ref of the Parent TSR into the Deal Ref field.

l. If you are submitting a RENEWAL, type the Assign Ref of the Parent TSR into the Related Ref field.

m. To receive status notifications concerning your TSR, type your email address into the Status Notification field.

n. For Transfer TSRs, type the message, "Related to a Transfer," into the Comment field.

Click the Enter TSR icon .

Verify the information displayed is correct.

o. To make corrections, click the Back icon to return to the New TSR screen.

p. Make the changes, and click the Enter TSR icon .

Click the Confirm TSR icon .

To save the TSR, click OK.

B. NITS Data Entry Order

1. One NITS Agent: Enter the data into webSmartOASIS in the following order:

   a. NITSNew Application

      i. While entering the data, right-click at the bottom of the data entry screen.

      ii. Checkmark the NITS Agent checkbox to display the Agent data entry section.

      iii. Enter information for one agent and save when completed.

   b. NITSLoad

   c. NITSGeneration (must be entered before DNR if Resource Type is GENERATION)

   d. NITSResource (must be entered before DNR or can be entered on the DNR Data Entry screen)

   e. NITSDNR

   f. Additional Agent

2. More than One NITS Agent: Enter the data into webSmartOASIS in the following order:

   a. Manually create a NewNITSApplication request in webSmartOASIS.

      i. While entering the data, right-click at the bottom of the data entry screen.

      ii. Checkmark the NITS Agent checkbox to display the Agent data entry section.

      iii. Enter the information for one agent and save when completed.

   b. Manually enter the Load, Generation, Resource and DNR requests for the customer.

   c. After all requests have been changed to Confirmed status, add the additional Agent(s):

      i. Select Transactions > NITS > Request Summary.

      ii. Click the ADD NEW icon in the upper-right toolbar.

      iii. Select Add/Modify Agent.

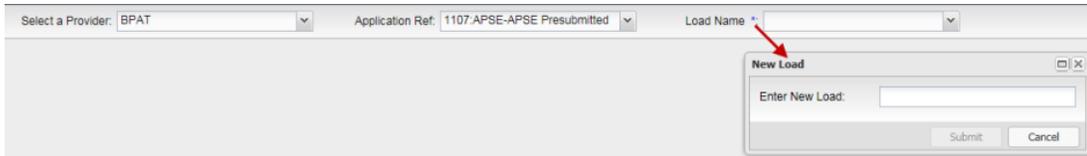   iv. Enter the data for the additional Agent and save.

C. New NITS Application

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

   a. NITS Request Summary - Click the dropdown next to the icon to select New Application.

   b. Request Information - Select the following information:

      i. Provider (BPAT)

      ii. Status (QUEUED or PRECONFIRMED)

      iii. Preconfirmed (NO or YES)

   c. NITS Service – Enter the Effective Start Time and Effective Stop.

   d. NITS Customer - Select the following information:

      i. Customer Code

      ii. Customer Name

      iii. Status Notification (optional)

      iv. Attested (Request will fail unless the ATTESTED dropdown is set to YES)

      v. Attestor Name (Required)

      vi. Attestation Submitter (Required)

      vii. Customer Statement defaults to the language determined by the Transmission Service Provider and cannot be edited

      viii. The Effective Start Time and Effective Stop cannot be edited

   e. Click to enter the application.

D. New NITS Load

3. Log into webSmartOASIS.

4. Click Transactions and then click Request Summary.

5. NITS Request Summary - Click the dropdown next to the icon to select Add/Modify Load.

6. Select the following:

   a. Provider (BPAT)

   b. Application Ref (Ref number of application to add load)

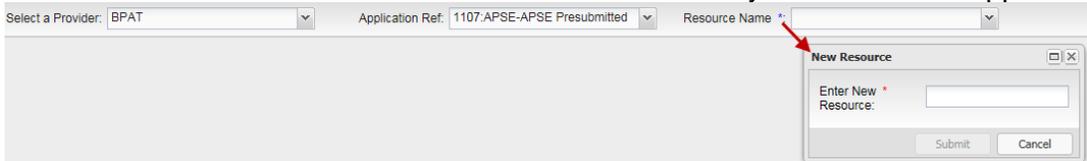7. Click the asterisk next to the Load Name dropdown to enter the name of the Load.

   Note: The Load Name must not be the same as one already created for the Application.

8. Click ✅ to enter the new load.

E. New NITS Resource

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

3. NITS Request Summary - Click the dropdown next to the 📋 icon to select Add/Modify Resource.

4. Select the following:

    a. Provider (BPAT)

    b. Application Ref (Ref number of application to add resource)

5. Click the asterisk next to the Resource Name dropdown to enter the name of the Resource.

6. The Resource Name must not be the same as one already created for the Application.

7. Click ✅ to enter the new resource.

F. New NITS DNR

Note: If a DNR is submitted Pre-confirmed, it will go straight to ACCEPTED/CONFIRMED status, and the Customer will not be able to REBID.

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

3. NITS Request Summary - Click the dropdown next to the 📋 icon to select Add DNR.

4. Select the following:

    a. Provider (BPAT)

    b. Application Ref (Ref number of application to add resource)

5. Click the asterisk next to the Resource Name dropdown to enter the name of a New Resource or select an existing Resource from the dropdown list.

Note: If creating a new Resource, the Load Name must not be the same as one already created for the Application.

6. The request will fail unless ATTESTED dropdown is set to YES.

7. Enter the TSR Assign Ref in the Request Ref field in the NITS Resource Description section.

   Note: If the DNR involves multiple TSRs, additional TSR Assign Refs may be entered into the Customer Comment field.

8. The Attestor Name and Attestation Submitter are required.

9. The DNR Attestation defaults to the language determined by the Transmission Service Provider and cannot be edited.

10. To profile a DNR, click the either Add Row Above 🖿 or Add Row Below 🖿 icon in the NITS Resource Capacity section of the screen.

    Note: To delete a row, highlight the row to delete and click the Delete Selected Row 🗙 icon.
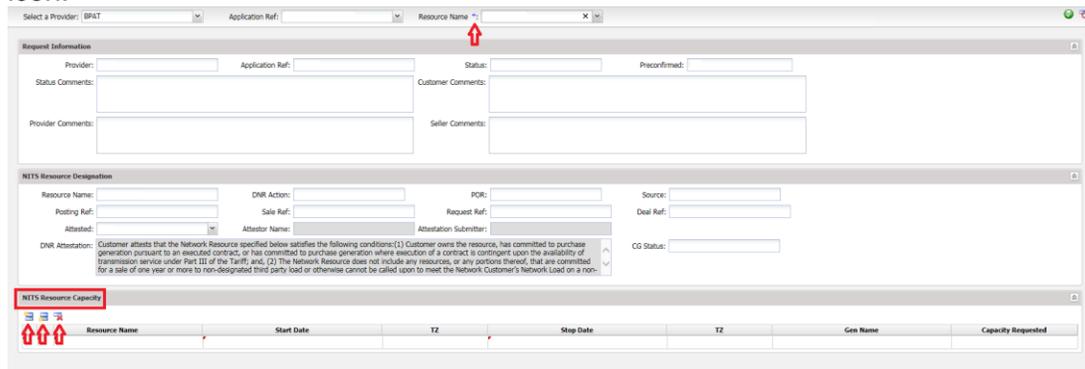
11. After creating each request, the Request Summary screen must be manually refreshed in order to see the new request.

12. To verify and correct data before a Request is queued, enter the Request in Presubmitted Status.

13. When ready to update the status queued, select the Assignment Ref of the NewNITSApplication and change the status to QUEUED. This will change all presubmitted Requests for that application to Queued.

    a. Requests entered with a status of Presubmitted will display in the Request Summary screen only if the PRESUBMITTED checkbox is marked on the Server Filter Options screen.

    b. Requests which are in QUEUED status will display in the Request Summary screen only if the PRESUBMITTED checkbox is unmarked.

G. DNR Extension for a Year or More

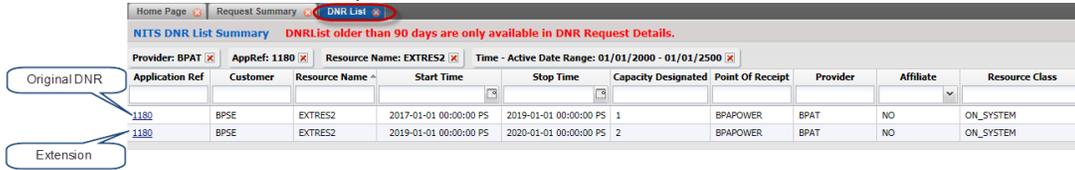Note: To extend a DNR, the DNR must be in a CONFIRMED state.

1. Log into webSmartOASIS.
2. Click Transactions and then click Request Summary.
3. From the NITS Request Summary screen, click the dropdown next to the icon to select Add DNR.
4. Select the Provider, Application and Resource name of the DNR to be extended.
5. Select DESIGNATION_EXTENSION as the DNR Action.
6. From the NITS Resource Capacity section, type the Extension start date. The Extension start date should begin when the Original DNR ends.

Note: If the dates of the Extension overlap the dates on the Original DNR, the Capacity will be aggregated together.

	Start Date	Stop Date	Capacity
Original DNR	1/1/2017	1/1/2019	1
Extension	1/1/2018	1/1/2020	2

The Total Capacity for 1/1/2018 through 1/1/2019 would be 3.

7. Enter the Extension stop date.

8. Enter the capacity to be extended into the Capacity Requested column.

9. Click the ✅ icon to save the DNR Extension.

10. To view the DNR Extension, click Transactions > DNR List screen.

H. Temporary Undesignation

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

3. From the NITS Request Summary screen, click the dropdown next to the 📋 icon to select Terminate DNR.

4. Select the Provider, Application and Resource name of the DNR to which the Temporary Undesignation applies.

5. Select TEMPORARY_TERMINATION as the DNR Action.

6. Note that the Attestation information is required for a Temporary Termination.

7. Enter the dates to which the termination applies.

8. Enter the Capacity amount affected by the termination. This must be a negative number.

    Example: The capacity of the original DNR is 7MW and it is now being reduced by 4 MW for one year, leaving 3 MW for that year.

9. Click the ✅ icon to save the DNR Extension.

10. To view the DNR Termination, click Transactions > DNR List screen.

I. Indefinite (Permanent) Undesignation

1. Log into webSmartOASIS.

2. Click Transactions and then click Reservation Summary.

3. From the NITS Request Summary screen, click the dropdown next to the [icon] icon to select Terminate DNR.

4. Select the Provider, Application and Resource name of the DNR to which the Temporary Undesignation applies.

5. Select INDEFINITE_TERMINATION as the DNR Action.

6. Note that the Attestation information is NOT required for an Indefinite Termination.

7. Enter the Start date of the termination. The Stop date must be left blank.

8. Enter the Capacity amount affected by the termination, as a negative number.

   Example: 3 MW is being permanently undesignated starting 1 year after the beginning of the Original DNR.

9. Click the [icon] icon to save the DNR Extension.

J. Filtering for NITS Proxy TSRs

1. Log into webSmartOASIS.

2. Click Transactions and then click Reservation Summary.

3. Click the filtering icon [icon].

4. Click Show NITS checkbox and then click Apply.

K. Displaying All NITS Requests

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

L. Creating a Resource and DNR at the Same Time

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

3. From the NITS Request Summary screen, click the dropdown next to the icon to select Add DNR.

4. Select the Provider and Application Ref.

5. Click the asterisk, enter a New Resource and click Submit.

   NOTE: This should only be done if the Resource has not already been created separately.

6. The Resource and DNR information may be entered together on the same form.

M. DNR for Upstream Transmission

1. Log into webSmartOASIS.

2. Click Transactions and then click Request Summary.

3. From the NITS Request Summary screen, click the dropdown next to the icon to select Add DNR.

4. Select the Provider, Application Ref, and Resource Name that requires the DNR for upstream transmission.

5. Right-click on the bottom of the DNR screen to display the following dialog box.
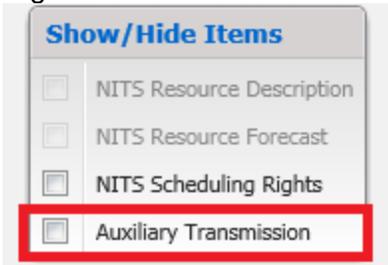
6. Click the Auxiliary Transmission checkbox to display the Auxiliary Transmission section of the DNR.

7. Enter the Assign Ref of the TSR for upstream transmission into the CRAssignmentRef field.

8. Click the ✅ icon to save the DNR Extension.

N. REBIDS on DNR

To REBID a DNR, the DNR must not be submitted Pre-confirmed. Refer to section F above for DNR submittal.