TRADE SECRET

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1. Introduction

The purpose of this document is to serve as a quick reference guide for Market Operators (MOs) to register under the MO role in the North American Energy Standards Board (NAESB) Electric Industry Registry (EIR) system, or update their existing registration, for use in the functionality outlined in v1.8.3 of the NAESB e-Tag specifications.

1.1 New MO Registration

This section describes the steps to register a new MO code-role.

1.2 Updating Existing MOs

Existing MO registrations will need to be updated with additional information so that the registration can be used on e-Tags. This section describes the steps to update an existing MO code-role to add the additional required information.
2. **New MO Registration**

This section describes the steps to register a new MO code-role.

1. **Open Market Operators Summary Display.**

Open the Market Operators Summary display, located under Entities > Market Operators.

2. **Open Market Operator Entry Display.**

Click on the “new MO” button to open the Market Operator display.

3. **Select Entity.**

Select the Entity that the new MO will belong to.

4. **Enter Long Name.**

Enter the Long Name for the MO.

5. **Select Entity Role.**

The Entity Role of “MO” should be pre-selected. No action is needed.

Enter the name of the Entity Role Code

| Entity Role Code | OWMO |

7. Enter Effective Dates.

Enter the Effective Start and Effective Stop Dates of the new MO.

| Effective Date | 04/10/2017 | 01/01/3000 |

8. Enter Contacts Information.

Enter the Contacts information for the MO. A “24 Hour” contact is required.

<table>
<thead>
<tr>
<th>Type</th>
<th>User</th>
<th>Name</th>
<th>Phone</th>
<th>Fax</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 Hour</td>
<td>Select if applicable</td>
<td>Test User</td>
<td>(612) 123-4567</td>
<td>(612) 123-4567</td>
<td><a href="mailto:test@oati.com">test@oati.com</a></td>
</tr>
</tbody>
</table>

9. Enter Applications URL Information.

Enter the Applications URL information for the MO. An E-Tag “Tag Agent URL” and an E-Tag “Tag Approval URL” are both required.

<table>
<thead>
<tr>
<th>Application</th>
<th>Service</th>
<th>Load from ASP</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Tag</td>
<td>Tag Agent URL</td>
<td>Select if applicable</td>
<td><a href="https://www.oati.com">https://www.oati.com</a></td>
</tr>
<tr>
<td>E-Tag</td>
<td>Tag Approval URL</td>
<td>Select if applicable</td>
<td><a href="https://www.oati2.com">https://www.oati2.com</a></td>
</tr>
</tbody>
</table>

10. Enter Balancing Authority (BA) / Transmission Service Provider (TSP) Associations.

Enter the BAs/TSPs that are associated with the MO. To enter a BA/TSP association, first select the Type [BA, TSP] from the dropdown. Then select the BA or TSP from the Code dropdown. Multiple BAs/TSPs may be associated with a single MO. At least one BA or TSP association is required.

<table>
<thead>
<tr>
<th>Type</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>BA</td>
<td>TEST</td>
</tr>
</tbody>
</table>
11. Click on the “Enter” Button.

Click the “Enter” button to submit the MO.

12. Click on the “OK” Button to Confirm.

Review the pop-up text, and click the “OK” button to confirm.


The new MO must be approved by NAESB, and each of the BAs/TSPs that are associated with it.

14. Payment.

Once the code-role has been fully approved, the code role must be paid for. The payment can be made via the "Payment > Subscription Summary" display, by clicking on the "New Payment" button.
3. Update Existing MOs

Existing MO registrations will need to be updated with additional information so that the registration can be used on e-Tags. This section describes the steps to update an existing MO code-role to add the additional required information.

1. Open Market Operators Summary Display.

Open the Market Operators Summary display, located under Entities > Market Operators.

2. Open the Existing MO.

Click on the link of the existing MO to be updated under the “Code” column in the Market Operators Summary display to edit the MO in the Market Operator Entry display.

3. Enter Applications URL Information.

Enter the Applications URL information for the MO. An e-Tag “Tag Agent URL” and an e-Tag “Tag Approval URL” are both required if they are not already entered for the MO.
4. Enter BA/TSP Associations.

Enter the BAs/TSPs that are associated with the MO. To enter a BA/TSP association, first select the Type {BA, TSP} from the dropdown. Then select the BA or TSP from the Code dropdown. Multiple BAs/TSPs may be associated with a single MO. At least one BA or TSP association is required.

5. Update Effective Start Date.

The Effective Start Date of the updated MO must be updated to start on the current date, or a future date if the changes are intended to take effect on a later date.

6. Click on the “Modify” Button.

Click the “Modify” button to submit changes for the MO.

7. Click on the “OK” button to Confirm.

Review the pop-up text, and click the “OK” button to confirm.
8. Approvals.

The changes must be approved by NAESB, and each of the BAs/TSPs that were associated with the MO.