



Member Impacting Project Overview: PR20090023 – RSS Data Availability



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Version Control

Version	Date	Author	Change Description
1.0	09-30-09	G Watson	Initial Draft
1.1	10-10-09	R Sanders	Added information re Settlements Contingency Report Added FAQ section to address BA/PSE questions
1.2	12-18-09	R Sanders	Added information to support full delivery of project.
1.3	01-15-10	R Sanders	Added release information for RSS changes. All changes are <u>redlined</u> .

Executive Summary

To ensure the appropriate RSS data is available to authorized users, a change was promoted on August 5 in RTOSS. The GUI displaying outage schedules with generator names was changed to mask the generator names for a specific type of user (PSE) which was already implemented with user profiles.

A similar change was made to RSS to create new roles and one effort under project PR20090023 is to move users into one of those two roles. SPP will work with RSG members to identify which role users should will be assigned and execute the user profile changes with OATI.

A second effort with this project is to create an RSS Administrator (RSS Admin) role at each RSS user organization. SPP will work with the new RSS Admin to ensure appropriate compliance information is understood by the RSS Admin. Once turned over to the RSS Admin, all user permissions will be administered by each organization working directly with OATI.

A third effort is to discontinue the Contingency Report distributed by Settlements to ensure compliance requirements are met with the data provided on that report. The data previously provided on this report is available on RSS.

Introduction

There is a compliance implication if the PSE (marketing) organization of the company sees information concerning an RSS event to which they are not authorized. The project ensures users are segregated appropriately so that there is no compliance concern.

Business Impact

SPP will work with members to identify which role of the two roles to which the users should be assigned – Each user is either within a Balancing Authority or within a Purchasing Serving Entity. Each RSG organization will indicate to SPP which container each user should belong.

All users in the Balancing Authority of the RSG participating organizations will remain unaffected, the access they currently have will not be changed (they will stay in the BA container).

If there are any users who are within the PSE areas of participating organizations, they will be moved to the new “PSE” container. The PSE container has the ability to call an RSS event and view all event details *only* for generators of which the PSE’s company owns. The PSE container also has a “read only” configuration in the event an RSG company does not allow their marketing users to all RSS events. The RSS Admin for the RSG organization will manage user access in the future.

Members who require the data previously provided on the Contingency Report can retrieve this data via RSS. To access RSS, members must have an RSS UserID.

Technical Impact / Implementation

If any users are moved from their current setting to the PSE container, they will not be able to view the generator that tripped, unless their company owns that generator.

Ongoing, the RSS Admin for the organization will request access for the RSS container for any new users. Balancing Authority users will be added to the BA Container, and Marketing/PSE users will be added to the PSE container. This access will be requested by the RSS Admin at the RSG organization directly with OATI. The request by the RSS Admin of this access signifies that the RSS Admin has verified whether the user belongs in the BA or the PSE container.

Due to no method to manage user access via e-mail distribution list, the Contingency Report is no longer distributed via e-mail or FTP. Data previously provided on this report is available via RSS. To request an RSS User ID today, members must contact their Customer Relations Representative, or contact OATI Support. However, once PR20090023 is complete, members will contact their RSS Admin.

RSS User Container Changes and Differences

The following differences describe the functionality for each container, including the changes that will be available on January 19, 2010. Changes available on January 19 are redlined.

<u>RSS Screen Name</u>	<u>BA Container</u>	<u>PSE Container</u>
<u>Event Manager</u>	<p><u>Event Modification</u> enabled; this function allows the BA user to call events.</p> <p>BA's can view all generators within their BA footprint from the filter drop-down list.</p>	<p><u>Event Modification</u> enabled for the non-"read only" PSE user; PSE user able to view and call events only for generators that are owned by their company.</p>
<u>Event Report</u>	<p><u>Facility</u> filter displays all units within the BA footprint.</p> <p>All facilities within the BA footprint are viewable seven days after the event.</p>	<p><u>Facility</u> filter only lists units owned by the PSE's company.</p> <p><u>Facility</u> shows Unavailable, unless the unit belongs to the PSE's company; in this case, the Facility is displayed. (PSE can never view, not even seven days after the event has occurred.)</p>
<u>Event Summary</u>	<p><u>Facility</u> filter drop-down includes all units within that BA foot print.</p> <p>BA's can view all facilities within the BA foot print.</p>	<p><u>Facility</u> filter drop-down only includes facilities in which the PSE company owns generators.</p> <p>PSE's can view only the facilities in which they own generators.</p>
<u>Assistant Schedules</u>	Enabled for BA container.	Enabled for PSE container.
<u>Resource Schedules</u>	Enabled for BA container.	Enable for PSE container; only displaying facilities for which the PSE company owns generators.

<u>Configuration Tab</u>	<u>User Settings enabled for both BA and PSE users.</u>	
<u>Data Tab</u>	<p>The following screens are enabled:</p> <p><u>TSR Summary</u> – BA's can view events for all within the BA footprint.</p> <p><u>Resource Configuration</u></p> <p><u>Reserve Obligation</u></p> <p><u>Facility Capacity</u></p> <p><u>JOU Summary</u></p> <p><u>Audit Trail</u></p>	<p>The following screens are enabled:</p> <p><u>TSR Summary</u> – PSE's can only view events when the PSE is the customer.</p> <p><u>Resource Configuration</u></p> <p><u>Facility Capacity</u></p>

Testing

As SPP makes these user changes (moving users to PSE Container), the RSG Point of Contact for the organization will be on a conference call with SPP and OATI. As users are moved, the POC will ensure the user understands the change in security, and can still access other aspects of the RSS system with no impact.

Testing in ITE of these RSS functions may be arranged at the request of any RSG company. Contact a member of the project team for arrangements.

Training

Training of these RSS functions may be arranged at the request of any RSG company. Contact a member of the project team for arrangements.

Summary of Timeline

Sept 21 – January 31:

1. Using a newly provided listing of all users in RSS from IT, SPP CR will contact each RSG organization, and receive a direction from the organization as to which container each user should be assigned.
2. SPP will contact the RSG member and OATI for a conference call and modify the user profiles while on the call as per the container ordered by the RSG organization.
3. The RSG organization will confirm that all users are moved to the correct containers.

October 2 – January 31:

1. SPP will draft a procedure for Local Security Administrator for RSS User Administration
2. Implement new LSA procedure with OATI and all RSG organizations.

Communication

All project communication will be emailed to the CWG and the RSG Point of Contact at each RSG organization.

Project Team Contact Information

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FAQ

Can a BA user be set up as “read only”?

Yes

Can a PSE user be set up as “read only”?

Yes, a “read only” configuration for PSE container users currently exists.

Is there a limitation of RSS users that a company can have?

Yes; the maximum users is different per company, and is controlled/managed by OATi. Contact OATi Support for the number of maximum users for your company, or to make a change to your company’s existing limit.

Can I have more than one RSS Admin?

Yes. Information about the RSS Administration process will be provided in the near future as SPP and OATi develops the RSS Administration process.

Can PSE users view tripped generator information after a lapse in time following an event? (For example, 7 days after the event has occurred?)

No, a user set up in the PSE container should never view the tripped generator information unless the generator is owned by the company.

Does the RSS Administrator require an additional OATi certificate?

No, the RSS Admin does not require a separate certificate just for that admin function. If the RSS Admin already has a certificate for access to RSS, an additional certificate is not required due to the RSS Admin role **does not** involve administration of user setup changes to the system. This role works with OATi to ensure appropriate set up/changes for RSS users at their company. OATi will continue make all RSS user configuration changes.

What are the differences between the BA Container and PSE Container?

For system differences, refer to the **RSS Container Changes and Differences** section of this document.

Next Steps

Action	Assignee	Status & Due Date
Make contact with each RSG organization to determine container to which each user should be assigned	SPP Customer Relations	<u>01-31-2010</u>
Working with OATI and RSG organization, assign users to correct containers	SPP IT, OATI, RSG Points of Contact	<u>01-31-2010</u>
Draft and implement RSS Administration procedure for RSS	SPP	<u>01-31-2010</u>