



Member Impacting
Project Overview:
PR20100042 –
webTrans and
Scheduling Upgrade
[V2.0](#)



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Trademarks Notice

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Version Control

Version	Date	Author	Change Description
1.0	8/20/10	Dawn-Marie Coggins, Ginny Watson	Initial Document, Added OATI release dates, Modified notes from OATI
2.0	9/28/10	Dawn-Marie Coggins	Modified notes from OATI, location of OATI release notes reference

Executive Summary

FERC Orders 729 and 676E require changes to webTrans Oasis and other OATI products. OATI has indicated an upgrade must be accomplished to webTrans before the compliance-related changes can be released.

SPP's Oasis and webTrans is currently at release 4.1. We will need to upgrade to release 4.3.

Business Impact

MEMBER FACING:

There are many screen changes and minor member-facing changes included in the 4.2 and 4.3 upgrade. None of these changes will require members to make changes to their systems. A summary of the changes is attached to this document as Appendices. Additional information is available from OATI's release notes, which are posted in the respective systems [hereunder the dropdown menu option](#):

Misc>Help menu

Technical Impact

None

Testing

Members are not required to test this upgrade; however, members are encouraged to test and become familiar with the changes.

[OATI indicates a portion of the release \(webtrans 4.3\) will not be released for testing until 10-05-10.](#)

Training

There is no training necessary for these changes.

Summary of Timeline

The 4.2 and 4.3 upgrades will be tested together and will be promoted together to production. The timeline is as follows:

4.2 and partial 4.3 release to ITE	09-28-10
Remaining 4.3 release to ITE	10-05-10
4.2 and 4.3 release to PROD	11-01-10

Communication

Ginny Watson is the SPP project manager for the webTrans Upgrade Project effort. Ginny will give monthly updates at the CWG meetings.

APPENDIX A

Scheduling Release Notes Summary--4.2.00

Schedules:

Curtail from Schedule Option —The restriction for GCA or LCA only has been removed, so curtailments can be issued by any reliability entity.

Schedule Creation —The schedule creation process has been modified to ensure unique criteria are used when multiple wheel schedules need to be created from the same tag.

Schedule Detail:

Add Note on Schedule Detail —The Add Note feature has been corrected and the Data ID will be automatically populated with the schedule name.

Transmission Total/Avail Columns —A zero (0) will now be displayed in the Transmission Total/Avail Columns.

Partial Hour Pop-Up —The partial hour pop-up window will display all sub-hourly profiles on manual schedules. The partial hour pop-up window is accessible by clicking on the red asterisk (*) next to the HE label.

New Schedule:

Grid Entry —Pressing the Enter button on the keyboard will advance the cursor to the next hour on the grid entry form.

Schedule Modify:

Partial Hours —Corrections to the Modify Schedule display to ensure the partial hours are shown correctly and the hourly MW value is integrated correctly.

Grid Entry —Pressing the Enter button on the keyboard will advance the cursor to the next hour on the grid entry form.

Scheduling Release Notes Summary--4.2.01

Schedules:

Schedule Creation from Schedule Type Tags —The Schedule Creation process has been modified for Schedule Type tags that have a start time in the past. The initial schedules will be created for all dates in the past as well as creating the schedule up to seven (7) days in the future, even if this is more than eight (8) days of schedule creation.

Dynamic Schedules Created After-the-Fact —Check the “Approve dynamic schedules that are created after the fact” option in the Company Options display.

Dynamic Schedule Auto-Approval —Check the “Automatically change dynamic schedule status after the hour is completed” option in the Company Options display.

Schedule Search:

Schedule Search Make-Over —More information is now shown on the Schedule Search display:

- **Schedule Name**
- *
- **Flow**
- **Schedule Date**
 - **By Date Mode**
 - **By Name Mode**

Contributing Schedules:

Contributing Schedules Make-Over —Changes to the display were needed to improve curtailment and adjustment functionality. The changes are:

- Three functions are now managed in three separate views (Checkout, Curtailment, and Adjustment). The buttons at the top of the display are used to switch between views.
- Priority Column has been added to show Firm or Non-Firm priority using the GPE product code.
- The messages have been improved in the Contributing Schedule display.

Scheduling Release Notes Summary--4.3.00

webTrans Scheduling Software Variances

Schedules:

Data Entry Error when Deleting Schedule—Delete Schedule option has been modified to ensure there are no Data Entry Errors when a portion of the schedule has already been moved out of the operational database.

Corrected Contract on Notification Schedules Data—A change has been made to ensure any corrections to the Contract field are properly captured on the Notification Schedule. If a contract is entered for both GCA and LCA, the contract field on the schedule will have a comma- separated list containing both contracts.

Time Zone Passed from Parent Display—When opening the Schedule Detail display, the time zone will be passed from the parent display.

Interchange:

Months Available in the Monthly Checkout Calculation Display—The display has been modified to show current month plus eleven (11) in the dropdown.

Extra HTML Code Displayed—The Contributing Schedule display has been modified to ensure the display refreshes properly after any schedule is modified.

Configuration:

Cancelling Comments—A change has been made to the comment prompt to ensure it can be cancelled and the Page Loading message not be displayed. The message on the comment prompt has also been changed to remove reference to the checkout comment.

Audit Trail:

Dynamic Approval Company Option—The General Audit Trail has been modified to ensure changes to any company options that are properly captured.

Miscellaneous:

webTrans Scheduling Software Enhancements

Schedules:

Schedule SubType and Associated Product Type—A new column, Product Code, has been added to the Schedule SubType popup display. This column will show the product associated with the configured subtype.

Interchange:

Net Hourly Checkout on BTF Checkout—Previously, this process would record an entry in the audit trail for all schedules contributing to the interface. With this new release, if the Net Hourly Checkout is being applied, the process will record an entry in the audit trail for the interface only.

Adjustment Request from CPSE—A change has been made to the Adjustment mode. If the Schedule Type is not Dynamic or Pseudo Tie and the Reference Entity = CPSE, the adjustment request will be sent as coming from Company Type = PSE.

Configuration:

User Options Not Applicable in New GUI—The following options have been removed from the Scheduling User Options display as they are no longer applicable in the new GUI:

- Disable Graph
- Hide Tag Path
- Include Ramp in Graph
- Options for opening the Schedule Detail display

Audit Trail:

Category Filter Option—This option on the Schedule Audit Trail now supports multi-select. To multi-select from the dropdown list, hold the Shift or Ctrl key while clicking the mouse.

Category Filter Option—This option on the General Audit Trail now supports multi-select. To multi-select from the dropdown list, hold the Shift or Ctrl key while clicking the mouse.

External Interfaces:**webGUI Enhancements****webGUI Updates:**

Time of Last Update—The date and time when the display was last updated will be displayed in the lower left corner of the display. The time zone selected in the change time zone display (under the misc menu) determines which time zone is represented.

Date Filter Option—Arrows have been added to the date filter option to enable quick advancement to the next or previous date.

Use Archive Filter Option—This option has been added to the display. This enables the user to query the archive database without having to select the option in the user options display.

Container Filter Option—This option has been added to the display. Users who only have privileges to view one container will not be able to change the selection.

APPENDIX B

webTrans Release Notes Summary--4.2.00

TSR Detail:

Validation Results Visible in Print View —If the validation log is visible on the TSR Detail display, it will be included in the print view.

Annul TSR from Any Status —The “Annulled” button will now always be visible on the TSR Detail display regardless of the status of the TSR.

TSR Validation:

TSR Validation Summary Filter Options —New filter options have been added to the TSR Validation display: Increment, Deal Ref, Preconfirmed, and Excluded.

Portfolio Management:

MW Value for Recall and Relinquish —The Original (O) value for Recall requests will be displayed as a negative value. The Original (O) value for Relinquish requests will be displayed as a zero. This will prevent the Recall and Relinquish request types from increasing the MW totals.

Request Type Filter Option —The NOT RECALL selection has been modified to ensure all non-recall reservations are displayed.

Segment Filter Option —The Segment filter option has been added to the ATC Component Data display.

Discretions:

Default Stop Time —When creating a new posting for Standard of Conduct, Personnel Transfer, Waiver or Discretion, the stop time will default to 90 days from the current date (default start time).

Tag Validation and Approval:

User-Defined Tag Validation Criteria Import —The error has been corrected in the User-Defined Tag Validation Criteria import process.

Add Aref to Validation Fail Reason —The Aref can now be associated with each fail reason by adding %AREF% to the fail reason.

Stop Time Validation —A new validation, Stop at the Hour, will check to ensure the Stop Time on the e-Tag is equal to xx:00.

Displays:

Tag Validation Monitor — This version combines the data and features of the Tag validation Monitor and Tag Validation Report back into one display. The Tag Validation Report has been removed.

User and System Configuration and Data Maintenance:

Remote Login Enabled Column —The User Name column has been replaced with the ETS Login Enabled column. YES will be displayed if the Remote Login is enabled for the user. No will be displayed if the Remote Login is not enabled for the user.

Email Address in User Profile —The allowable number of characters in the email field has been increased to 100 characters.

webOASIS Remote Login —The Remote login process to OASIS has been changed to automatically establish a session with OATI webOASIS upon login to webTrans. Due to this change, users who have remote login to webOASIS enabled will notice an extra certificate prompt when logging into webTrans.

User Name Filter Option —The User Name filter option has been corrected to ensure the data is limited.

Rates and Billing--Price Data:

Floor/Ceiling Price —The Price Data display has been modified to ensure the same value can be entered for the Ceiling and Floor prices.

Miscellaneous:

Time Zone for Display Updated Time —The updated time on the display has been corrected to show the Standard or Daylight Time Zone appropriately.

Audit Trail:

TSR Status Change in Audit Log —The format in the audit log has been modified to make it easier to read the TSR Status Change actions, as well as the user performing the change.

Alarms:

Acknowledging Hard Alarms —The pop-up window with the Hard Alarms display will close after the user has acknowledged any alarms.

New Alarms —Three new alarms have been added to webTrans: New Outage Created, Outage Updated, and REBID Reservation Status.

Real-Time and Day Ahead Alarm Options —These have been added to the validation alarms.

Graphical User Interface (webGUI):

New webTrans Logo —Users will see the new OATI logo and product banner on the login page and the webTrans Dashboard.

Icons:

Legend Icon —The light bulb icon has been added to the system. This opens a legend which will describe the colors, symbols, hyperlinks, and actions available on the display.

webTrans ~~Scheduling~~ Release Notes Summary--4.2.01

OASIS TSR Summary:

TS Type Filter Option —The TS Type filter option dropdown is now automatically populated using the Provider defined Transmission Services Type attribute.

Aref Column Sort —Sorting by the Aref column has been corrected. The records will be sorted in alphanumeric order.

Tag Validation and Approval

Displays:

Date Format on Tag Approval Monitor —The date/time values on the Tag Approval Monitor are now displayed using the standard webTrans date/time format: yyyy-mm-dd hh:mm:ss TZ.

Wrong Start/Stop Time Shown in Validation Log —A change has been made to ensure the correct Start and Stop times are shown in the Validation Log when the tag fails the Limit MW check.

User and System Configuration and Data Maintenance

Audit Trail:

Character Limit in Audit Log —The character limit has been removed from the audit log. Data will no longer be truncated.

Audit Log Detail Data Alignment —The Audit Log Detail display has been modified to ensure the Old and New Value data is properly aligned.

Auto-Approval Failed Alarm —A change has been made to not generate the Auto-Approval Failed alarm when the user takes manual action.

OASIS TSR Summary:

Secondary Column Sorting on TSR Summary —A change has been made to correctly order the TSRs with the same Queued Time when sorting by the Queued Time column. The TSRs will be ordered by the Aref if the Queued Times are identical.

Short Name Filter Option —A new filter option has been added to the TSR Summary display. Multi-select is supported.

TSN Type Column and Filter Option —This new column has been added to the TSR Summary display. The corresponding filter option has been relabeled from TSN to TSN Type.

Hyperlinks for Related Ref and Reassigned Ref —These hyperlinks have been added to the Related Ref and Reassigned Ref columns. Clicking on these will open the TSR Detail display for the respective TSR.

Refresh Paused Added to Old GUI —When filtering for data from the historical data (usually a stop time greater than 168 hours in the past), the refresh will automatically be paused.

TSR Detail:

Portfolio Management:

Number of Characters in the Aref Filter Option —The character limitation in the Aref filter Option has been increased to 1600-characters.

OASIS Postings**Messages:**

Row Coloring —Row coloring has been added to the Message Posting display. The row coloring identifies the status of the posting: Green = Successful, Red = Failed, or Error.

Discretion:

Row Coloring —Row coloring has been added to the Discretion Posting display. The row coloring identifies the status of the posting: Green = Successful, Red = Failed, or Error.

Tag Validation and Approval**Tag Validation:**

Date/Time User-Defined Tag Validation —The constant-Date field has been replaced with Constant-Text. When this field is selected, the input fields will be shown for the format string, offset, and time zone.

Displays:

PSE Comment Column on Tag Validation Monitor —This new column has been added to the Tag Validation Monitor. It is not available for sorting.

Date Filter Options —The available selections under the time filter option have been changed. Start/Stop has been replaced with Active. A separate Start and End option has also been added.

Wildcard in Aref Filter Option —The use of wildcard characters in the Aref filter option on the Tag Validation Monitor has been modified. The following can be used as wildcard characters at the beginning, end, or middle of a string:

- Asterisk (*)—replace multiple values
- Percentage (%)—replace multiple values
- Question mark (?)—replace a single value

User and System Configuration and Data Maintenance:

User Time Zone Column —The user’s time zone selection is now visible on the Update User display. This allows users with admin privileges to verify the user’s time zone selection.

Filter Options Added to Modify Certificates —Filter Options have been added to the Modify Certificates display. The filter options are not case sensitive. Partial values can be entered. The asterisk and question mark can also be used as a wildcard.

Password Reset Error Message —The error message “User Information Incorrect” will now be displayed for all unsuccessful password resets.

Data:

Transmission Customer Mapping Export/Import Data —The option to Export Data or Import Data has been added to the Transmission Customer Mapping display.

Miscellaneous Legend:

Legend Icon —The light bulb icon has been added to the system. This opens the page legend which will describe the colors, symbols, hyperlinks, and actions available on the display.

Display Refresh

Display Refresh —This is now managed through the Display Options. The refresh icon will change depending on whether the display refresh is enabled, disabled, or paused.

More Information Added to webTrans Dashboard —Additional items of information and functionality have been added to the webTrans Dashboard

Entity Index Filter Option —This new filter option has been added to the Audit Log Summary. It corresponds to the data in the Entity Index column.

Alarms:

System Refresh After Alarm Configuration —A change has been made to force a full-system refresh after making changes on the Alarm Preferences Configuration display. This full-system refresh will close all open windows and immediately activate the configured alarm preferences.

Alarm Configuration —A change has been made to the Alarm Preferences Configuration display. If the user selects the soft checkbox or a sound option without first configuring the indicator text, the user will receive an error when they attempt to apply the changes.

New Sound Options —New sound options have been added to the webTrans Alarm Preferences: Mystery 1, Mystery 2, Train, Siren 1, and Siren 2.

Graphical User Interface (webGUI) Enhancements:

Display Time of Last Update —The date and time when the display was last updated will be displayed in the lower left corner of the display.

Filter Options:

Date Advance Option —Arrows have been added to the date filter option to allow quick advancement to the next date.

Column Configuration:

Resizing the Column Configuration —This list will now resize to the width of the longest column name when the default length is exceeded.

Display Views:

Hide Shared Views —An option to hide all shared views has been added to the menu. Any display views that are marked as shared, regardless of who created them, will be hidden.

webTrans ~~Scheduling~~ Release Notes Summary--4.3.00

webTrans Software Variances

Transmission Reservation Management

OASIS TSR Summary:

Competing and Negotiate Flags—The columns will show the actual values of Y/N/null/O.

TSR Detail:

Related Ref Hyperlink—A change was made to the code to properly display the capacity graph when opening the TSR Detail from the Related Ref hyperlink.

TSR Availability Graph—Impacts from Relinquish and Transfer types are now properly accounted for in the graph.

TSR Customer Notification—This hyperlink has been modified.

TSR Validation:

Comma in Fail Reason—The Fail Reason has been modified to properly support a comma.

Portfolio Management:

Partial Method Filter Option—A change has been made to ensure the display works correctly when changing the Partial Method filter option.

Discretions:

Create New Discretion Posting—A change has been made to the validation that is performed when creating a new discretion posting. This change ensures the posting can be created, regardless of the time of day.

Tag Validation and Approval

Tag Validation:

Tag Validation Monitor Filter Options—The filter options have been modified to ignore case completely. Filtering by “FourCorners” will return the same results as “FOURCORNERS.”

Comma in Fail Reason—The Fail Reason has been modified to properly support a comma.

Displays:

Check MW Hyperlink—The filter options set in the Tag Validation Monitor will be passed to the Reduction Detail display when it is opened by clicking on the Check MW hyperlink.

User and System Configuration and Data Maintenance

Remote Login Enabled Column on User Summary—The display has been modified to correctly show YES or NO.

Reset Password Phone Number Format—Change has been made to ensure the new password email is not sent when the phone number format is incorrect.

Miscellaneous

Remote Login to OATI webTag—Change has been made to ensure the menu item is not available if the remote login capability has been disabled.

Audit Trail:

Message Post Audit—A change has been made to show the actual status “Successful, Failed, or Pending.”

webTrans Software Enhancements

Transmission Reservation Management

OASIS TSR Summary—The columns “Customer Comment,” “Provider Comment,” and “Seller Comment” are trimmed down to the length as in the old TSR Summary, and the hover-over popup appears to show the whole comment.

TS Types on TSR Summary—The TSType filter option will now be populated.

Profiles MW Requested—The asterisk has been added back to the MW Req amount.

TSR Detail:

Impacted Hyperlink—The Impacted number will open the Reduction Detail display.

webTrans Displacement Confirmation—A pop-up will be shown to the user, asking them to confirm the action after clicking on the displace button.

TSR Validation:

TSR Validation Criteria—A new Service Flag filter option has been added to the display. The filter option will have “Active,” “Inactive,” and “All.”

Portfolio Management:

Segment Filter—The filter option has been modified to only display active segments.

Messages:

Additional Fields on Message Posting Detail display—The Posting Ref, Reason, and Error Message fields have been added to the Message Posting detail display.

Tag Validation and Approval:

Tag Approval Monitor Hover-Over—Font size has been increased and will resize proportionally to the display's main font size when it is changed by the user.

Tag Auto Approval Setup Display—The following changes have been made to the Tag Auto Approval Setup display:

- The name of the display has been changed to Tag Auto Action Setup
- The Auto Approval Enabled column has been renamed to Auto Action Enable Changes
- The Tag Auto Approval Detail display has been renamed to Tag Auto Action Detail display (available by clicking on the provider hyperlink from the setup display)
- The Auto Approval Request has been renamed Auto Action Request
- The Approval Flag is now the Enable Flag
- The Auto Approval Enable is now the Auto Action Enable

Tag Validation Displays:

Tag Validation Monitor Refresh—When Tag Validation Monitor display options have “Auto Refresh Enabled,” requests shown on the display will have an additional filter applied limiting requests to those validated in the past 12 hours. When this additional Auto Refresh Validation Time filter is applied to the results being shown on the display, the following message is shown: “Only requests validated in the past 12 hours are shown.”

There were also additional changes made to the display that affect the Result and Action columns. If a single request had pass and fail validation results across its segments, the Result filter would look at the individual segment pass/fail result instead of the request's composite pass/fail result. This could lead to an incorrect Result and Action being displayed when using the Result filter on requests with multiple physical/transmission segments of varying pass and fail results. This only affected the display, not the actual validation result and action.

User and System Configuration and Data Maintenance

Certificate Common Name—This column has been added to the User Summary display.

Miscellaneous

Audit Trail:

Time Zone in Audit Log—The time zone has been added to the Audit Log Detail display.

Alarm Preferences Audit—Changes have been made to ensure changes are sent to the audit trail.

Audit Trail Summary Column Width—The Old Value and New Value columns have been limited to show only the first 1000 characters.

webGUI Enhancements

OATI webGUI Updates

General Changes:

Time of Last Update—The date and time when the display was last updated will be displayed in the lower left corner of the display. The time zone selected in the change time zone display (under the miscellaneous menu) determines which time zone is represented.

Icons:

Legend Icon—The light bulb icon has been added to the system. This opens the page legend, which will describe the colors, symbols, hyperlinks, and actions available on the display.

Filter Options:

Date Filter Option—Arrows have been added to the date filter option to enable quick advancement to the next or previous date.