



# **TCR RELEASE 3.1**

## Job Aid for Structured Testing

June 20, 2018

SPP Customer Training

## REVISION HISTORY

---

DATE OR VERSION NUMBER	AUTHOR	CHANGE DESCRIPTION	COMMENTS
6/11/2018	Michael Daly	Initial Draft	For TCR Release 3.1 Structured Testing

### **NOTICE:**

The information, practices, processes and procedures outlined and contained in this publication are the intellectual property of Southwest Power Pool, Inc. and are protected by law.

This publication or any part thereof, is for training purposes only and may not be reproduced or transmitted in any form or by any means without express written permission of Southwest Power Pool, Inc.

The information contained herein is compiled and maintained by the SPP RTO Customer Training Department and is provided to recipients for informational purposes only.

# CONTENTS

---

Revision History ..... i

Monthly ARR Allocation Task Overview ..... 1

Verify Incremental Transmission Service ..... 2

Submit Monthly Candidate ARR Nominations Via TCR MUI ..... 4

Submit Monthly Candidate ARR Nominations Via CSV File for Stage 1 ..... 7

Submit Monthly Candidate ARR Nominations Via CSV File for Stage 2 ..... 9

Download Results from Monthly ARR Allocation ..... 12

## MONTHLY ARR ALLOCATION TASK OVERVIEW

---

Market Participants (MPs) use the TCR MUI to complete the following tasks for the **Monthly** ARR Allocation:

1. Verify Incremental Transmission Service
2. Submit Monthly Candidate ARR Nominations
3. Download Results from the Monthly ARR Allocation

## VERIFY INCREMENTAL TRANSMISSION SERVICE

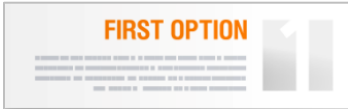
Below are the steps to verify if Transmission Service Reservations (TSRs) in OASIS match the incremental entitlements SPP assigned to the AO for the **Monthly ARR Allocation**. Entitlements already given in the Annual ARR Allocation will not be shown in this download.

Step	Action	Comments
1	In the TCR MUI, click on the <b>Download</b> tab.	
2	Select <b>Private</b> .	Three tabs display: General, Market, and Results.
3	Click on the <b>Market</b> tab.	
4	Select the applicable options from the <b>Market Term</b> and <b>Market</b> drop-down menus.	The file with the results display below the tab.
5	Select the <b>XML</b> or <b>CSV</b> checkbox to the right of the Transmission Service Reservations AND Allocation Summary files depending on which format the user prefers.	
6	Click <b>Download</b> .	A message displays asking if the user wants to open or save a zip file.
7	Click <b>Open</b> or <b>Save</b> for each file, as applicable.	A zip file with TSR to ARR Mapping displays if the user opens the Transmission Service Reservations file.  A zip file with the Historical Peak Load (HPL) and Nomination Cap displays if the user opens the Allocation Summary file.
8	Double click on the applicable file.	A message displays asking if the user wants to open the file.
9	Click <b>Open</b> .	The file opens. The user can save the file at this time, if desired.

Step	Action	Comments
10	<p><u>Transmission Service Reservation file:</u>                      Locate the applicable TSR data in OASIS. Compare that data to the incremental entitlement data in the TCR MUI to confirm that the allotted entitlement covers the TSR period, path, and MWs.</p> <p><u>Allocation Summary file:</u>                      Verify the HPL and Global Cap values.</p>	<p>Users may also want to compare the Grandfathered Agreement (GFA) transmission service in their GFA Registration Packet to the incremental entitlement data in the TCR MUI.</p>

## SUBMIT MONTHLY CANDIDATE ARR NOMINATIONS VIA TCR MUI

Below are the steps to request ARRs for the **Monthly ARR Allocation**.



### From the ARR Nominations Tab:

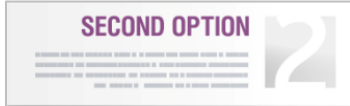
Step	Action	Comments
1	In the TCR MUI, click on the <b>ARR Nominations</b> tab.	
2	Select the applicable options from the <b>Market, Period, and Round</b> drop-down menus.	<b>NOTE:</b> The user must complete this step before continuing with the Nomination Process.  The Effective Dates and the Nomination Window Timeframes display to the right of these menus for the user's convenience.
3	Click <b>Go</b> .	In the Summary section, a summary of Round Caps displays based on a particular class (e.g. on-peak versus off-peak).  The Candidate ARRs display below the Summary section. They display on two tabs: <b>PTP</b> and <b>NITS</b> for <b>Stage 1</b> .
4	<b>For Stage 1</b> , click on the applicable tab: <b>PTP</b> or <b>NITS</b> .	The <b>Stage 1</b> tab displays only those MWs that can be nominated.
5	Click on the <b>Nominated MW</b> column for the applicable Candidate ARR.	The <b>Nominated MW</b> column is the only column that is editable.

Step	Action	Comments
6	<p>Enter a number that is <b><u>NO GREATER THAN</u></b> the identified path cap of the particular Candidate ARR.</p> <p>The path cap displays in the <b>Candidate MW</b> column.</p>	<p>Users have three options to nominate MWs:</p> <ol style="list-style-type: none"> <li>1. Manually click on each cell (<b>Nominated MW</b> column).</li> <li>2. Download the <b>Nomination File</b> spreadsheet, make the nominations on the spreadsheet, save the spreadsheet, and upload it back into the TCR MUI. This updates the <b>Nominated MW</b> column in the system.</li> <li>3. Complete the task via an associated API.</li> </ol>
7	<p>Repeat steps 4-6 for each Candidate ARR on the <b>PTP</b> and <b>NITS</b> tabs.</p>	<p><b>NOTE:</b> Users have a one-day window to modify the <b>Nominated MW</b> column of their Candidate ARRs.</p>
8	<p>MPs wishing to participate in <b>Stage 2</b>, where a percentage (%) of any ARR nomination cap can be awarded, should continue with the following steps.</p> <p>MPs <u>not participating</u> in <b>Stage 2</b> of the Monthly ARR Allocation may proceed to step 18.</p>	<p><b>NOTE:</b> Participation in <b>Stage 2</b> is <b>voluntary</b>.</p>
9	<p>In the TCR MUI, click the <b>Stage 2</b> tab.</p>	
10	<p>Click the applicable tab: <b>PTP</b> or <b>NITS</b>.</p>	
11	<p>Click <b>Add</b>.</p>	<p>A generic record displays in the Nomination Editor as a new row.</p>
12	<p>Click on the row to highlight it.</p>	



Step	Action	Comments
13	In the Data panel, located on the right side of the page, click on the <b>plus sign</b> to the left of the Sources and Sinks folder.	This action displays all Settlement Locations in a tree view.
14	To select a Settlement Location as the source, locate the desired Settlement Location in the tree view and click on the name of the Settlement Location. Then, click the <b>Set Source</b> button located above the Sources & Sinks folder.	The <b>Source</b> column auto-populates in the new record (row) in the Nomination Editor.
15	To select a Settlement Location as the sink, locate the desired Settlement Location in the tree view and click on the name of the Settlement Location. Then, click the <b>Set Sink</b> button located above the Sources & Sinks folder.	The <b>Sink</b> column auto-populates in the new record (row) in the Nomination Editor.
16	Click on the <b>Nomination %</b> column and enter a desired percentage amount to the nearest 0.01 increment.	<b>NOTE:</b> This column cannot exceed 100.0%. All nominations for <b>Stage 2</b> may not total over 100.0%.
17	If desired, enter a MW quantity in the <b>Nomination Limit</b> column.	<b>NOTE:</b> This action will limit any residual ARR awards to an exact quantity up to 0.1 MWs.
18	Click <b>Save</b> after entering all nominated MWs.	The “Data Saved Successfully” window or an Error Message displays if the data submitted is incorrect.  Click on the <b>plus sign</b> to the left of the <b>Status</b> column to view the error details.
19	Click <b>OK</b> .	

# SUBMIT MONTHLY CANDIDATE ARR NOMINATIONS VIA CSV FILE FOR STAGE 1



### From the Nomination File Spreadsheet for Stage 1:

Step	Action	Comments
1	From the Nomination Editor, click <b>Download</b> .	A message displays asking if the user wants to open a file.
2	Click <b>Open</b> or <b>Save</b> , as applicable.	If the user clicks <b>Open</b> , the Candidate ARRs for the applicable tab ( <b>PTP</b> and <b>NITS</b> ) display in a CSV-formatted spreadsheet.
3	Click on the <b>Nominated MW</b> column for a specific Candidate ARR.	The <b>Nominated MW</b> column will be <b>Column C</b> in the spreadsheet.
4	Enter a number that is <u>NO GREATER THAN</u> the identified path cap of the particular Candidate ARR.	The path cap displays in the <b>Candidate MW</b> column (column B).
5	Repeat steps 3 and 4 for each Candidate ARR.	<b>NOTE:</b> Users have one-day window to modify the <b>Nominated MW</b> column of their Candidate ARRs.
6	Click on the <b>Save</b> icon at the top of the spreadsheet.	The "Save As" window displays.
7	Verify the name you want to save the spreadsheet under in the <b>File name</b> field.	
8	Click <b>Save</b> .	A window may display asking if the user wants to keep the spreadsheet's (file's) current format.
9	Click <b>Yes</b> .	
10	Close the spreadsheet.	
11	In the TCR MUI, click <b>Upload</b> .	The "Nomination Upload" window displays.

Step	Action	Comments
12	Click <b>Browse</b> .	
13	Locate and click on the spreadsheet the user just saved.	
14	Click <b>Open</b> .	The file displays in the <b>File</b> field in the “Nomination Upload” window.
15	Click on the <b>Upload</b> button in the “Nomination Upload” window.	The TCR MUI uploads the file and a validation message displays.
16	Click <b>Close</b> .	The <b>Nominated MW</b> column updates with the changes made in the spreadsheet.

## SUBMIT MONTHLY CANDIDATE ARR NOMINATIONS VIA CSV FILE FOR STAGE 2



### From the Nomination File Spreadsheet for Stage 2 (Optional):

Step	Action	Comments
1	From the Nomination Editor, click <b>Download</b> .	A message displays asking if the user wants to open a file.
2	Click <b>Open</b> or <b>Save</b> , as applicable.	If the user clicks <b>Open</b> , a blank CSV-formatted spreadsheet will open.
3	Go to <b>Column G</b> and set your desired Source location.	Source locations are located in the TCR MUI on the <b>Stage 2</b> tab on the right-hand side under the data heading. Click on the <b>plus sign</b> to the left of the Sources & Sinks folder to display all Settlement Locations in a tree view.  <b>NOTE:</b> Users must correctly enter the Source location or an error message will be received.
4	Go to <b>Column H</b> and set your desired Sink location.	Sink locations are located in the TCR MUI on the <b>Stage 2</b> tab on the right-hand side under the data heading. Click on the <b>plus sign</b> to the left of the Sources & Sinks folder to display all Settlement Locations in a tree view.  <b>NOTE:</b> Users must correctly enter the Sink location or an error message will be received.
5	Go to <b>Column A</b> and enter a desired percentage amount to the nearest 0.01 increment.	<b>NOTE:</b> This column cannot exceed 100.0%. All nominations for <b>Stage 2</b> may not total over 100.0%.

Step	Action	Comments
6	If desired, enter a MW quantity in the <b>Nomination Limit</b> column (column B).	<b>NOTE:</b> This action will limit any residual ARR awards to an exact MW quantity up to 0.1MWs.
7	Enter <b>PTP</b> or <b>NITS</b> in the Service Type column (column E).	This designation must correspond with the MP's TSR.
8	Enter the Asset Owner Name in <b>Column F</b> .	
9	Enter <b>ON</b> or <b>OFF</b> in <b>Column I</b> .	This action will specify if the MP desires On-peak or Off-peak service.
10	Enter the appropriate <b>Period Name</b> in <b>Column J</b> .	The Period Name can be found in the TCR MUI at the top of the nomination page, in between in the <b>Market</b> and <b>Round</b> drop-down menus.  <b>NOTE:</b> Users must correctly enter the Period Name or an error message will be received.
11	Click <b>Save</b> icon at the top of the spreadsheet.	The "Save As" window displays.
12	Verify the name you want to save the spreadsheet under in the <b>File Name</b> field.	
13	Click <b>Save</b> .	A window may display asking if the user wants to keep the spreadsheet's (file's) current format.
14	Click <b>Yes</b> .	
15	Close the spreadsheet.	
16	In the TCR MUI, click <b>Upload</b> .	The "Nomination Upload" window displays.
17	Click <b>Browse</b> .	

Step	Action	Comments
18	Locate and click on the spreadsheet the user just saved.	
19	Click <b>Open</b> .	The file displays in the <b>File</b> field in the “Nomination Upload” window.
20	Click on the <b>Upload</b> button in the “Nomination Upload” window.	The TCR MUI uploads the file and a validation message displays.
21	Click <b>Close</b> .	The <b>Nominated MW</b> column updates with the changes made in the spreadsheet.

## DOWNLOAD RESULTS FROM MONTHLY ARR ALLOCATION

---

Below are the steps to download results from the **Monthly ARR Allocation**.

Step	Action	Comments
1	In the TCR MUI, click on the <b>Download</b> tab.	
2	Select <b>Private</b> .	Three tabs display: General, Market, and Results.
3	Click on the <b>Results</b> tab.	
4	Select the applicable options from the <b>Market</b> , <b>Market Period</b> , and <b>Round</b> drop-down menus.	The file with the results display below the tab.
5	Select the <b>XML</b> or <b>CSV</b> checkbox to the right of the Allocation Results file, depending on what format the user wants to view the results.	
6	Click <b>Download</b> .	A message displays asking if the user wants to open or save a zip file.
7	Click <b>Open</b> or <b>Save</b> , as applicable.	If the user clicks <b>Open</b> , the zip file displays.
8	Double click on the applicable file.	A message displays asking if the user wants to open the file.
9	Click <b>Open</b> .	The file opens with the Monthly ARR Allocation Results.  The user can save the file at this time, if desired.