

June 11, 2009

**TO: TADS Reporting Transmission Owners**

**Copy: TADS Regional Entity Coordinators and OATI Phase II Support staff**

**Subject: Preparation for TADS Phase II**

This letter is addressed to TADS “Reporting TOs” (contacts declared on webTADS Form 1.2). During 2009, each Reporting TO needs to get ready for TADS Phase II. Phase II implements the reporting of Non-Automatic Outages which occur during Calendar Year 2010. See Attachment 1 below for the Phase II implementation schedule.

## **Phase II Schedule**

As noted on schedule item 2) and 5), internal business process changes by Reporting TOs need to be completed by fourth quarter 2009. By the first week of October 2009, webTADS Phase II software will be placed in-service on the production server and made available for all Reporting TOs to logon and begin the 2010 registration process (2010 Forms 1.2 and 2.x). From September to November 2009, NERC will host several training sessions including webTADS software changes for Phase II. Reporting TO internal data collection procedures for Phase II should be tested and ready to start outage information recording by 01/01/2010. During 4<sup>th</sup> quarter 2009, as desired by each Reporting TO, voluntary testing of such procedures will be accommodated on the TADS development server. See the last section of this letter on that topic.

*Note to TOs in WECC:* Since WECC’s existing data collection process includes additional information beyond TADS, each TO in WECC will receive separate instructions on the WECC Schedule and how WECC TOs should submit data.

## **Form 6.x Bulk Upload using XML**

Phase II Form 6.x data can be bulk loaded into webTADS using one of the three methods below:

### **Method 1: XLS Spreadsheet export to XML**

This method is the same style as Form 4.x XLS spreadsheet export to a XML file. However, by October 2009 webTADS software will also provide a choice of time zone when the user uploads the XML file. The default choice will be UTC time zone. The volume of outages reported on Form 6.x is expected to be many times larger than Form 4.x. The raw outage data ‘copy’ and ‘paste special’ onto Form 6.x will be large. Error checking on the XLS spreadsheet is minimal. After data pasting and manual error correction, the individual Form XLS spreadsheets can be exported as individual XML files. After the Form 6.x XML file is created using Method 1, the user can logon to webTADS and then upload the XML file using;

#### ***Process #1***

- Select the Form to import.
- Using the page filtering options navigate to the TADS company and current reporting period.

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- Browse to the XML file location.
- Specify the time zone of the data (UTC is default choice).
- Upload the XML file for error checking.
- If a fatal error exists, the XML file is rejected. The data needs to be corrected, exported to a new XML file and re-uploaded one Form at a time. This process continues for each company and each individual form.

The TADS 2010 XLS Workbook can be found on Attachment 4. See the revised Form 3.4 and new Forms 6.x. After webTADS software testing is completed in September, the final workbook will be posted on the TADS website. If you plan to use the XLS workbook to produce the XML bulk upload files, or plan to enter your data manually using the webTADS graphical user interface (GUI), you may skip reading Methods 2 and 3 below. Methods 2 and 3 provide the necessary information for Reporting TOs who do NOT wish to use the XLS workbook. If you are planning to modify your TO internal business system to produce the XML bulk upload files directly, please read the information below, and review the detailed Attachments 2 and 3.

### **Method 2: TO Internal Computer production of Individual XML files**

This method is the same style as Form 4.x bulk uploads. However, Phase II webTADS software will also provide a choice of time zone when the user uploads the XML file. The default choice will be UTC time zone. For each TO's Form 6.1, 6.2, 6.3 or 6.4 a separate XML file needs to be created following the XML design definitions specified in Attachment 2. After each XML file is created by the TO internal business process, the user can logon to webTADS and then use the above *Process #1* to upload the XML file.

If you are a single Reporting TO organization with an extremely large volume of data to manually manipulate and paste onto Form 6.x spreadsheets, instead of using Method 1, you may want to consider Method 2 as a better automated method of choice.


### **Method 3 (new): Multiple Form and Multiple Company data transfer**

This method is a new option for Phase II. If your business process handles several Reporting TOs or several Forms 6.x with a large volume of outage data, Method 3 may be your method of choice. Attachment #3 describes the details of this method. Multiple company data and multiple Forms 6.x can be transferred directly from your computer to webTADS. This method enables individual outage record transactions including individual outage record deletion, addition, updates, etc. Please note, however, each XML data set transfer will be error checked and the entire data set rejected if a fatal error is found.

An individual webTADS user (single logon ID) or a single Delegated Reporting Entity (DRE) which performs data entry for numerous Reporting TOs is the likely user of Method 3. Please see Attachment #3 for details.

### **Voluntary TO Testing – 4<sup>th</sup> Quarter 2009**

TO testing of Form 6.x bulk upload procedures is voluntary. If you plan to export Form 6.x spreadsheets into XML files (Method 1 above), this method is essentially the same as exporting Form 4.x. TO testing prior to 12/31/09 is voluntary. From 01/01/2010 to 12/31/2010 Form 6.x actual outages may be bulk uploaded onto the production server. However, from October 2009 to December 2009, voluntary TO testing of Form 6.x bulk upload procedures can be performed on the development server. If you plan to use Method 2 or Method 3, we encourage TOs & DREs to test their revised business processes (and associated XML software) during fourth quarter 2009. Please contact OATI Support prior to September 15<sup>th</sup>, if you wish to perform voluntary testing on



the webTADS development server. That testing will start in October. OATI will issue a special password and link to the development server for your use. TO voluntary testing will use sample data which will be discarded after TO testing ends on December 31, 2009.

If you have questions about this letter, or Attachment 1 Phase II schedule below, or the TADSTF website documents, please contact me or John Seelke. If you have webTADS software related questions or have questions about the attached OATI documents, please contact webTADS [Support@oati.net](mailto:Support@oati.net) (763-201-2000).

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## ATTACHMENT 1 -- Phase II Implementation Schedule:

**1) NERC/OATI Phase II software**

NERC/OATI will prepare, test, and implement webTADS Phase II software by October 1, 2009.

**2) Reporting TO internal business process modification**

The NERC board approved Phase II on October 29, 2008. From November 2008 to September 2009, each Reporting TO should modify their internal business process for TADS (including internal software changes, if any). TO software voluntary testing will begin October 1, 2009 after number 1) above is completed. During 4<sup>th</sup> quarter, TOs may perform integrated business process testing and upload bulk test data into webTADS.

**3) NERC/OATI training of webTADS users**

The course will be conducted on three separate occasions. The training time is expected to be a total of 4 hours (2 hours each day). Attendance is voluntary. The tentative training dates are;

a) September 30 & October 5, 2009 (Start Time 2PM EST)

b) October 29 & November 2, 2009 (Start Time 2PM EST)

c) November 19 & 23, 2009 (Start Time 2PM EST)

Please pick one of the above and mark the two days on your calendar. The first day will be webTADS software training, and the second day will be '*TADS Data Reporting Instruction Manual*' review. WebEx pre-registration for this course is not necessary. To attend each WebEx session, at the scheduled Start time use the following link <https://nerc.webex.com/> to go to the NERC WebEx site. You may 'Join' the session five minutes prior to the scheduled Start Time. The password is 'tads'. After typing in the password, that day's telephone Bridge# and Conference ID# will be displayed (and also listed on the WebEx 'Agenda').

Prior to the start of training, the 2010 '*TADS Data Reporting Instruction Manual*' and associated '*2008 TADS Master Data Forms*' XLS workbook will be posted on the TADS website (<http://www.nerc.com/filez/tadstf.html>). The changes will be noted in the "Version History" in the front of the Manual.

**4) 2010 Form 1.2 registration**

During October 2009, each Reporting TO should logon to webTADS to complete "2010 Form 1.2" registration for the "2010 Reporting Period", update the 2010 checklist of forms, and complete Form 2.x to declare which TO will report outages on multi-owner circuits.

**5) TO internal business process changes**

These internal business process changes are necessary to collect the attributes of each Non-Automatic Outage which occur during Calendar Year 2010. See Attachment 4 sample spreadsheets for Phase II: Form 3.4 and Form 6.1, 6.2, 6.3, 6.4. Each data column on Form 6.x represents an outage attribute which needs to be recorded by the TO internal business process starting 1/1/2010. TO internal business process changes need to be finalized prior to 1/1/2010.

**6) TO 2010 data entry into webTADS**

Each Reporting TO (or their Delegated Reporting Entity) needs to complete all webTADS 2010 data entry including error corrections by 3/1/2011.

**7) NERC and TADS Regional Entity Coordinator (REC) review of TO reported data**

With the help from the appropriate TO, each REC will review the data starting 3/2/2011, and finish TO confirmed corrections by 3/23/2011. NERC review of the TO reported data will occur from 3/24 to 4/7/2011.

## **ATTACHMENT 2 – Form 6.x XML Design Definitions (Method 2):**

Logon to webTADS → chose the HELP menu → Documentation → “Form 6.x XML Design Definitions, June 2009, Version 1.3”

This OATI, Inc. reference document provides the *webTADS-XML-Schema* definitions for formatting XML files to be imported into the webTADS database.

## **ATTACHMENT 3 – Computer to Computer Data Transfer (Method 3):**

Logon to webTADS → chose the HELP menu → Documentation → “Computer to Computer Data Transfer, May 2009, Version 1.1”

This OATI, Inc. document provides the *webTADS Web Service User Guide* for computer to computer communication to transfer multiple forms and multiple company data into the webTADS database.

## **ATTACHMENT 4 – 2010 TADS Workbook including Phase II Forms:**

See XLS workbook file named “ATTACHMENT 4 – 2010 TADS workbook 20090529.XLS”

This work book includes the revised spreadsheets for 2010 including Form 3.4, Forms 6.1, 6.2, 6.3, and 6.4. After software testing is completed during September 2009, the final 2010 workbook will be posted on the TADSWG website (<http://www.nerc.com/filez/tadswg.html> ).

Note: The document titles on this single page were revised 8/6/2009 to match the webTADS HELP document titles.