Misoperation Information Data Analysis System
User Guide
October, 2017
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Preface

The North American Electric Reliability Corporation (NERC) is a not-for-profit international regulatory authority whose mission is to assure the reliability and security of the bulk power system (BPS) in North America. NERC develops and enforces Reliability Standards; annually assesses seasonal and long-term reliability; monitors the BPS through system awareness; and educates, trains, and certifies industry personnel. NERC’s area of responsibility spans the continental United States, Canada, and the northern portion of Baja California, Mexico. NERC is the Electric Reliability Organization (ERO) for North America, subject to oversight by the Federal Energy Regulatory Commission (FERC) and governmental authorities in Canada. NERC’s jurisdiction includes users, owners, and operators of the BPS, which serves more than 334 million people.

The North American BPS is divided into eight Regional Entity (RE) boundaries as shown in the map and corresponding table below.

The highlighted areas denote overlap as some load-serving entities participate in one Region while associated transmission owners/operators participate in another.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRCC</td>
<td>Florida Reliability Coordinating Council</td>
</tr>
<tr>
<td>MRO</td>
<td>Midwest Reliability Organization</td>
</tr>
<tr>
<td>NPCC</td>
<td>Northeast Power Coordinating Council</td>
</tr>
<tr>
<td>RF</td>
<td>ReliabilityFirst</td>
</tr>
<tr>
<td>SERC</td>
<td>SERC Reliability Corporation</td>
</tr>
<tr>
<td>SPP RE</td>
<td>Southwest Power Pool Regional Entity</td>
</tr>
<tr>
<td>Texas RE</td>
<td>Texas Reliability Entity</td>
</tr>
<tr>
<td>WECC</td>
<td>Western Electricity Coordinating Council</td>
</tr>
</tbody>
</table>
Overview

This document is the MIDAS Portal’s user guide and provides extensive instructions on the various functionality that is made available through the MIDAS Portal. This document is not intended to instruct users how to gather nor document information relating to Misoperations.

Please email your regional contact and MIDAS@nerc.net with any questions that you are unable to answer using this document or if any of the information within this document needs updating.

Please note that all information relating to any given entity or company shown within this document exists only within the staging environment of the MIDAS Portal. It does not reflect actual information which has been or will be submitted by the entity or company.
Chapter 1: User Setup

Creating an Account

1. Navigate to NERC.com

2. In the upper right, click “Account Log-In/Register”

3. To the left, under “ERO Portal” click “Login”

4. In the upper right, click “Register”
5. Complete the required fields and click “Register”

6. Copy the PIN from the email sent to the address provided
   
   Dear MIDAS Example User,
   
   Your NERC ERO Portal registration PIN is 225685. This PIN will expire in 30 minutes.

   Please verify your account by entering the PIN that was sent to the email address: MIDASExampleUser@mailinator.com

   Paste the pin in the blank field and click “Submit”
8. At a minimum complete the required fields (First Name, Last Name, and Business Phone) for personal information.

9. Click “Next”

10. Complete at least the required fields (Street 1, City, State/Province, ZIP/Postal Code, Country) for work address information

11. Click “Next”
12. Click the magnifying icon

13. Choose your company:
   a. Type your company’s name in the search bar
   b. Click the magnifying glass or enter
   c. Click your company,
   d. Click “Select”.

14. Click “Next”

---

1 If reporting for multiple companies, select the primary company. Your account will be associated with additional companies later in the process.

2 If the company is not found, click “Cancel” and select “No” under “Did you find your company?” Complete the form on the screen that appears and click “Next”.

15. Create two security questions then click “Save”

Security

Security Question 1 *
What does NERC stand for?

Security Answer 1 *
North American Electric Reliability Corporation

Security Question 2 *
What city is NERC’s primary location?

Security Answer 2 *
Atlanta

Requesting Access to MIDAS

1. On the navigation bar, click “My Resources”, then click “Request Access”

2. Search for MIDAS
   a. In the search bar type in “MiDAS”
   b. Click “MiDAS Portal”
   c. Click “Submit Request”
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIDAS Portal</td>
<td>MIDAS Portal application within the ERO Portal</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries (filtered from 125 total entries) 1 row selected
3. Click the search icon for the Entity field

![MIDAS Portal Access Request](image)

4. Choose your company:
   a. Type your company's name in the search bar
   b. Click the magnifying glass or enter
   c. Click your company,
   d. Click “Select”.

![Search Results](image)

5. Click “Next”

---

3 If reporting for multiple companies, select the primary company. Your account will be associated with additional companies later in the process.
4 If the company is not found, click “Cancel” and select “No” under “Did you find your company?” Complete the form on the screen that appears and click “Next”.
6. Confirm the information then click “Submit”

**MIDAS Portal Access Request Details**

- **Resource you are requesting access to**: MIDAS Portal
- **Entity**: Old Dominion Electric Cooperative
- **Comments**

![Submit button]

**Vet Access Requests and Manage User Permissions**

1. Check that you have the company you wish to vet for selected in the top right corner

![Company selection](image)

2. Click your name then click “Manage Entity”

![Manage Entity option](image)

3. Under “Entity Users” click “Add Contact”

![Add Contact button](image)
4. Select the user
   a. In the search bar type either the name or username of the user being vetted
   b. Click “Search Contacts”
   c. Click their contact information
   d. Click “Submit”

5. Click the name of the user being vetted

6. Under “Manage User Permissions” click “Edit”

7. Select permissions the user should have then click “Submit”

   **Manage User Permissions for: Jack Norris**

   - **MIDAS Read-Only**
   - **MIDAS Entity Admin**
   - **MIDAS Reporter**

   Note: Read-Only only allows the user to view records and reports, it does not allow the user to create or modify records. Reporter allows the user to view, create, and edit records and reports. Entity Admin allows the user to view, create, and edit records and reports, as well as vet new users.

8. If the user was given the “MIDAS – Entity Admin” role, under “User Can Assign Permissions” click “Edit”
9. Select roles the user can vet other users for then click “Submit”

Remove Users

1. Check to ensure the correct company is selected in the top right corner

2. Click your name then click “Manage Entity”

3. Find the user who should be removed

4. Click “Remove User”
Chapter 2: Access the Portal

1. Navigate to the NERC ERO Portal (https://eroportal.nerc.net/) and login

2. In the navigation bar click “My Resources” then click “MIDAS Portal”
1. Under the “MIDAS Portal Menu” click “Bulk Submissions” 

From this screen users are able to create, deactivate, view, and export previously submitted Bulk Submissions.

**Bulk Submissions**

<table>
<thead>
<tr>
<th>Submission Date</th>
<th>Entity</th>
<th>Lead Region</th>
<th>Submission Quarter</th>
<th>Submission Year</th>
<th>Submitter Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/6/2017 2:35 PM</td>
<td>Old Dominion Electric</td>
<td></td>
<td>Qtr 2 (Apr 1 - Jun 30)</td>
<td>2017</td>
<td>Jack Norris</td>
<td>Active</td>
</tr>
</tbody>
</table>
Create a Bulk Submission

1. Click the “Create” button

2. Select the company’s region, year and quarter for the data submittal

3. Click “Browse...” then attach the completed MIDAS Reporting Template by double-clicking

4. Click “Submit”

5. After a few seconds click “Refresh Status”

6. Repeat step 5 until the submission’s status indicates successful or failed
7. If the validation failed perform necessary corrections then resubmit the file. A file containing all related validation errors can be exported by clicking “Export to Excel”.

8. Once the record has been validated an email will be sent to you and your regional contact. The regional contact reviews for completeness.

9. If no Misoperations or Protection System Operations are to be submitted complete a Waiver (Opt-Out), instructions can be found here.
View Details of a Bulk Submission

1. Click the dropdown arrow next to the Bulk Submission
2. Click “View Details” from the dropdown selection options

From this screen one can (1) view the Bulk Submission’s status, (2) export a copy of the file submitted, and (3) export a copy of the validation errors for the file.

Submission

<table>
<thead>
<tr>
<th>Created On</th>
<th>Submission Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/6/2017 4:44 PM</td>
<td>Qtr 2 (Apr 1 - Jun 30)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Submission Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCR0859 Q2 2017</td>
<td>2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Entity</th>
<th>Submitting User’s Name</th>
<th>Submitting User’s Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Dominion Electric Cooperative</td>
<td>MIDAS Example User</td>
<td><a href="mailto:JackNorris1@mailinator.com">JackNorris1@mailinator.com</a></td>
</tr>
</tbody>
</table>

Status

Validation Failed

Submission Files

1. 9 minutes ago
   MIDAS Example User
   MIDAS_Portal_UAT_NERC_File_6_InvalidCAP1.xlsx (136.06 KB)

2. 9 minutes ago
   NCR0859 Q2 2017 MinOps 962017 84441 PM_Errors.csv (210 bytes)
Deactivate a Bulk Submission
Deactivating a processed Bulk Submission will **not** deactivate the Misoperation or Protection System Operations records that were created. Steps to deactivate these records can be found in the Misoperations ([here](#)) and Protection System Operations ([here](#)) sections respectively.

1. Click the dropdown arrow next to the Bulk Submission you wish to be deactivated
2. Click “Deactivate” from the dropdown selection options

**Bulk Submissions**

![Bulk Submissions Table](#)

**View Deactivated Bulk Submissions**

1. Click the dropdown menu, labelled “Active Bulk Submission List” by default
2. Click “Inactive Bulk Submission List”
1. Under the “MIDAS Portal Menu” click “Misoperations”

From this screen users can create, deactivate, view, and export previously submitted individual Misoperations records.
## Misoperations

<table>
<thead>
<tr>
<th>Region</th>
<th>Category</th>
<th>MIDAS Record ID</th>
<th>Misoperation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRCC</td>
<td>Failure To Trip</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>MBO</td>
<td>Slow Trip</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>NPCC</td>
<td>Failure to Trip - During Fault</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>RT</td>
<td>Failure to Trip - Other than Fault</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>SREC</td>
<td>Slow Trip - During Fault</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>SPP</td>
<td>Slow Trip - Other than Fault</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

More ▼ More ▼

There are no records to display.
Create a Manual Misoperation Record

1. Click the “Create” button

2. Complete the “New Misoperation Record” form that pops up using the information about the Misoperation

3. Click “Submit”
4. If any errors appear correct them accordingly and repeat step 3

   The form could not be submitted for the following reasons:
   - Equipment Type is a required field.
   - Reported By is a required field.

5. Confirm that the submitted Misoperation record appears
View a Misoperation Record’s Details

1. Click the dropdown arrow next to the Misoperation record
2. Click “View Details” from the dropdown selection options

From this screen you are able to review the details of the Misoperation correlating with the record in a user-friendly manner.
Filter and Export Misoperation Records

1. Select filters you wish to apply to the current view
2. Click “Apply”. Not all filters need to be applied
3. Click “Export to Excel”
4. Open or save the exported file as desired
Modify an Existing Misoperation Record

1. Click the dropdown arrow next to the Misoperation record
2. Click “Edit” from the dropdown selection options
3. Perform the necessary modifications to the record. If any locked fields need to be modified the record should be deactivated and a new one created. Locked fields are used to concatenate a unique ID
4. Click “Submit”
**Deactivate a Misoperation Record**

1. Click the dropdown arrow next to the Misoperation record
2. Click “Deactivate” from the dropdown selection options

**View Deactivated Misoperations**

1. Click “MIDAS Portal – Active Misoperations”
2. Click “MIDAS Portal – Inactive Misoperations”
Chapter 5: Protection System Operations

1. Under the “MIDAS Portal Menu” click “Misoperations”

From this screen users can create, deactivate, view, and export previously submitted individual Protection System Operations records.

There are no records to display.
Create a Manual Protection System Operation Record

1. Click the “Create” button

   ![Create button]

   Search

   ![Create button]

   Export to Excel

2. Complete the “New Protection System Operation Record” form that pops up using the information about the Protection System Operation(s)

   ![New Protection System Operation Record form]

3. Click “Submit”
4. If any errors appear correct them accordingly and repeat step 3

5. Confirm that the submitted Misoperation record appears
View a Protection System Operation Record’s Details

1. Click the dropdown arrow next to the Protection System Operation record
2. Click “View Details” from the dropdown selection options
3. Review the details of the Protection System Operation correlating with the record in a user-friendly manner.

Protection System Operation Details

- **Status Reason**: Active
- **Name**: 2017_Q2_NCR00859_SERC_138kV
- **MIDAS Record ID**: 7911254
- **Operation Quarter**: Qtr 2 (Apr 1 - Jun 30)
- **Operation Year**: 2017
- **Operations Count**: 3
- **Entity**: Old Dominion Electric Cooperative
- **Region**: SERC
- **Jurisdiction**: United States
- **Voltage Class**: 138kV
- **Created By**: MIDAS Example User
- **Created On**: 9/7/2017 11:15 AM
Filter and Export Protection System Operation Records

5. Select filters you wish to apply to your current view then click “Apply”. Note that not all filters need to be applied.

6. Click “Export to Excel”

7. Open or save the exported file as desired.
Modify an Existing Protection System Operation Record

5. Click the dropdown arrow next to the Protection System Operation record

6. Click “Edit” from the dropdown selection options

7. Perform necessary modifications to the record. If any locked fields need to be modified the record should be deactivated and a new one created. Locked fields are used to concatenate a unique ID

8. Click “Submit”
Deactivate a Protection System Operation Record

3. Click the dropdown arrow next to the Protection System Operation record you wish to deactivate.
4. Click “Deactivate” from the dropdown selection options.

View Deactivated Protection System Operations

3. Click “Active Protection System Operations”.
4. Click “Inactive Protection System Operations”.
Chapter 6: Waivers (Opt-Outs)

1. Under the “MIDAS Portal Menu” click “Waivers (Opt-Outs)”

From this screen users are able to create, deactivate, view, and export previously submitted Waivers (Opt-Outs).
Create a Waiver (Opt-Out)

1. Click the “Create” button

2. Select the company’s region, the year and quarter

3. Check off to opt out of Protection System Operations (PS Ops), Misoperations (MisOps), or both

4. Click “Submit”
View a Waiver’s (Opt-Out) Details

1. Click the dropdown arrow next to the Bulk Submission
2. Click “View Details” from the dropdown selection options

From this screen view the details of the Waiver (Opt-Out) record.

**Waiver/Opt-Out Details**

<table>
<thead>
<tr>
<th>Name</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCR00859 - Old Dominion Electric Cooperative, Qtr 2 (Apr 1 - Jun 30)</td>
<td>MIDAS Example User</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Entity</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Dominion Electric Cooperative</td>
<td>9/7/2017 11:46 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submission Year</th>
<th>Updated By</th>
<th>Modified On</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>—</td>
<td>9/7/2017 11:46 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submission Quarter</th>
<th>Modified On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qtr 2 (Apr 1 - Jun 30)</td>
<td>9/7/2017 11:46 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SERC</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PS Ops - Opt In or Opt Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Opt In ☐ Opt Out</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MisOps - Opt In or Opt Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Opt In ☐ Opt Out</td>
</tr>
</tbody>
</table>
Deactivate a Waiver (Opt-Out)

1. Click the dropdown arrow next to the Waiver (Opt-Out)
2. Click “Deactivate” from the dropdown selection options

View Deactivated Waivers (Opt-Outs)

1. Click “MIDAS Portal – Active Misops Opt Out List”
2. Click “MIDAS Portal – Inactive Misops Opt Out List”
Chapter 7: MIDAS Reports

1. Under the “MIDAS Portal Menu” click “MIDAS Reports”

2. Select the report you would like to run
Submission Status Report

1. Click “Submission Status Report”

2. From your associated entities select the one(s) you wish to run the report for

Select Entities
- Plum Point Energy Associates (PPEA), LLC - GO
- Old Dominion Electric Cooperative

3. Select the Quarter and Year range you wish to run the report for

Target Quarter Start: Quarter 1 (January 1 - March 31)
Target Year Start: 2015

Target Quarter End: Quarter 4 (October 1 - December 31)
Target Year End: 2017

4. Click “Run Report” button

5. The report can then be printed or exported to Excel, PDF, or Word
Chapter 7: MIDAS Reports

Misoperations Rate Report

1. Click “Misoperations Rate Report”

2. From your associated entities select the one(s) you wish to run the report for

   Select Entities
   - Plum Point Energy Associates (PPEA), LLC - GO
   - Old Dominion Electric Cooperative

3. Select the Region you want the report to be run for

   Select Region
   - RF
   - SERC

4. Select the Quarter and Year range you wish to run the report for

   Target Quarter Start: Quarter 1 (January 1 - March 31)
   Target Year Start: 2015
   Target Quarter End: Quarter 4 (October 1 - December 31)
   Target Year End: 2017

5. Click “Run Report” button

6. The report can then be printed or exported to Excel, PDF, or Word