

NERC

NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

Misoperation Information Data Analysis System

User Guide

December 2020

RELIABILITY | RESILIENCE | SECURITY



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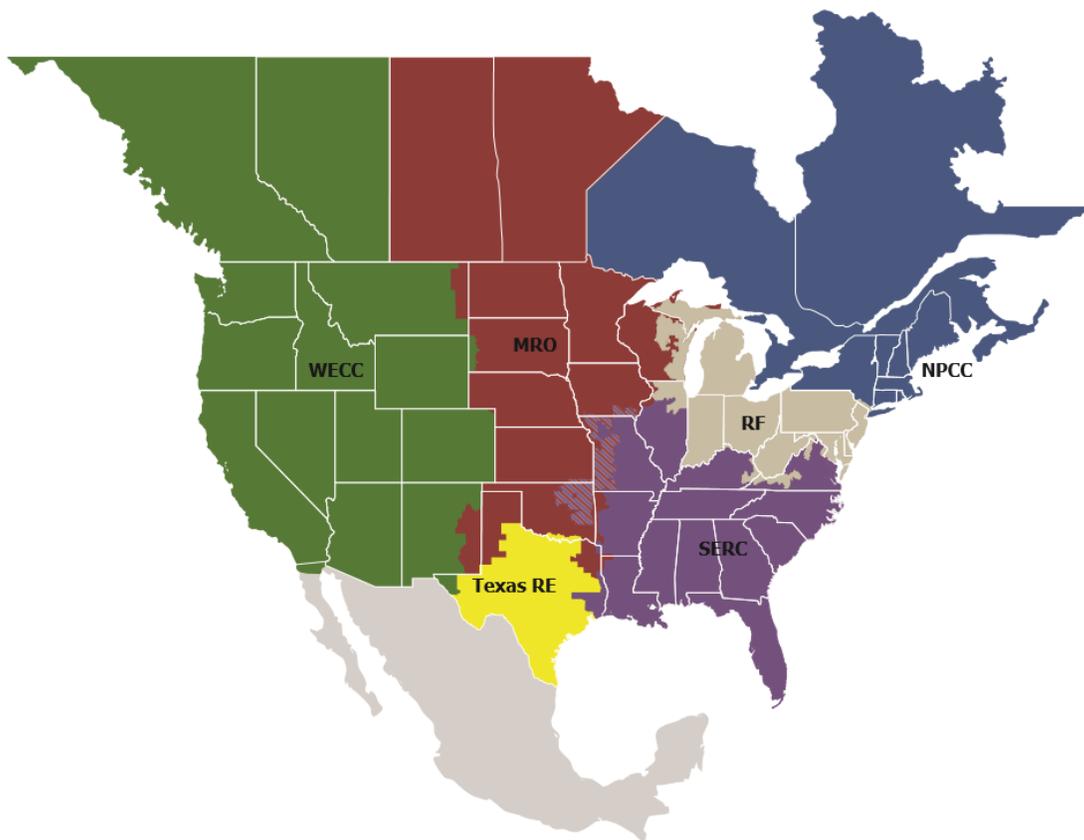
 Misoperations Rate Report 36

Preface

Electricity is a key component of the fabric of modern society and the Electric Reliability Organization (ERO) Enterprise serves to strengthen that fabric. The vision for the ERO Enterprise, which is comprised of the North American Electric Reliability Corporation (NERC) and the six Regional Entities (REs), is a highly reliable and secure North American bulk power system (BPS). Our mission is to assure the effective and efficient reduction of risks to the reliability and security of the grid.

Reliability | Resilience | Security
Because nearly 400 million citizens in North America are counting on us

The North American BPS is made up of six RE boundaries as shown in the map and corresponding table below. The multicolored area denotes overlap as some load-serving entities participate in one RE while associated Transmission Owners (TOs)/Operators (TOPs) participate in another.

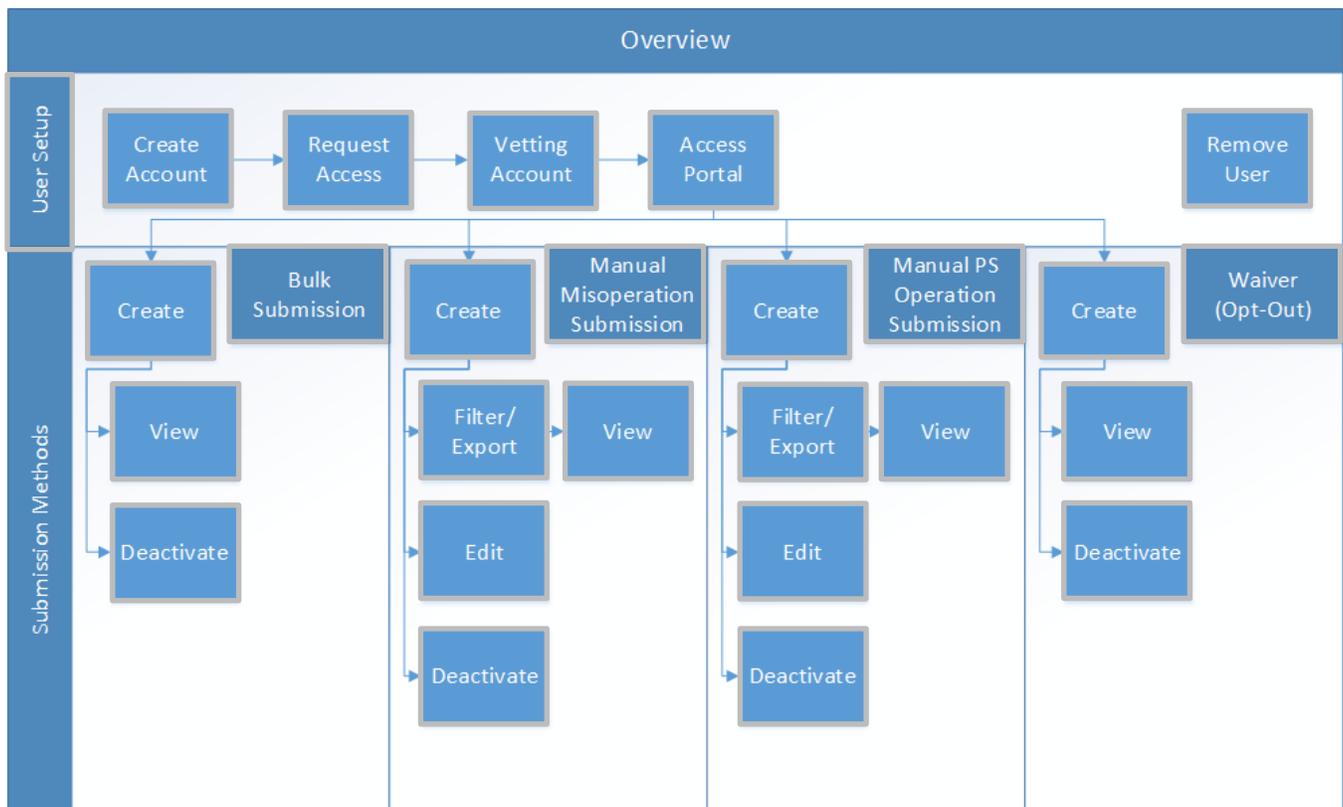


MRO	Midwest Reliability Organization
NPCC	Northeast Power Coordinating Council
RF	ReliabilityFirst
SERC	SERC Reliability Corporation
Texas RE	Texas Reliability Entity
WECC	WECC

Overview

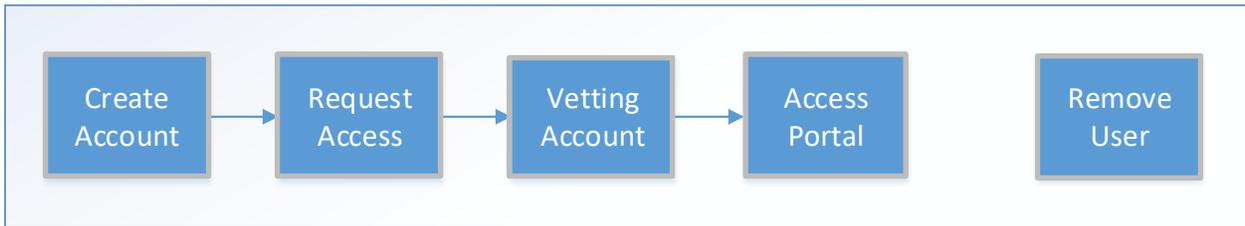
This document is the MIDAS Portal’s user guide and provides extensive instructions on the various functionality that is made available through the MIDAS Portal. This document is not intended to instruct users how to gather nor document information relating to Misoperations.

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

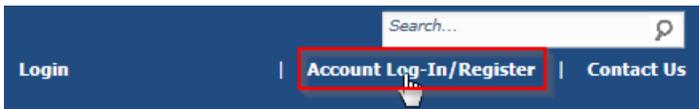


Creating an Account

1. Navigate to [NERC.com](http://www.nerc.com)



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



3. Under “Application Link”, Click “ERO Portal” (or go directly to <https://eroportal.nerc.net>)



4. In the upper right, click “Register”



5. Complete the required fields and click “Register”

Register for a new account

* First Name

* Last Name

* Email

* Confirm Email

* Username

* Password

- Minimum of 10 characters long.
- Must Contain at least 1 number, 1 lowercase letter, 1 uppercase letter, and 1 special character (!, @, #, \$, %, ^, &, *)

* Confirm Password



* Captcha

6. Look for the email that will come from NERC to confirm the account.

Confirm Registration

You will receive an email shortly with instructions on how to complete the registration process.

If you do not receive an email, please click [here](#) to resend.

If the problem continues, please contact the NERC Helpdesk by opening a ticket at: [NERC Helpdesk](#).

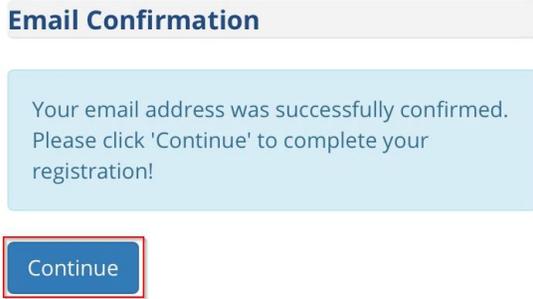
7. Click “Confirm Your Email” to verify the account.

Thanks so much for registering for access to the ERO Portal. To continue with your registration, you just need to confirm that we got your email right.

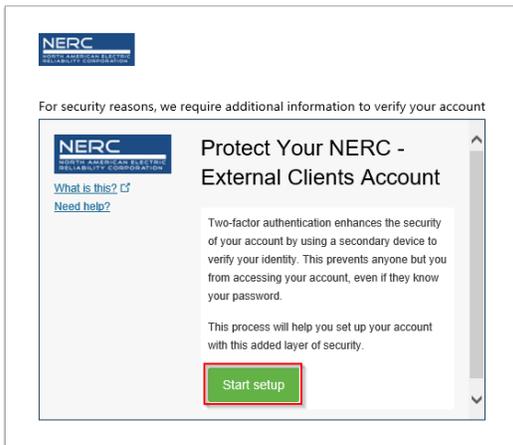
[Confirm Your Email](#)

Link not working? Try pasting this link into your browser:

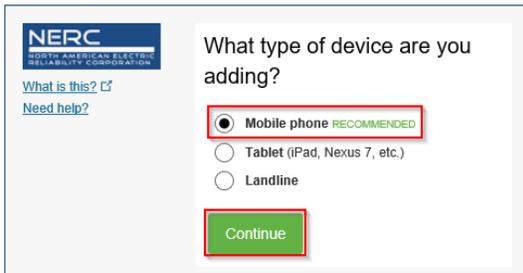
- Click "Continue" once the window is open on your screen.



- Click "Start setup" to setup the two-factor authentication.



- Choose the preferred device type and click "Continue".



- Enter the preferred phone number, confirm the phone number and click "Continue". Choose the phone type.



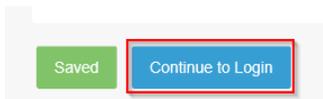
12. Install DUO Mobile, then click “I have Duo Mobile”.



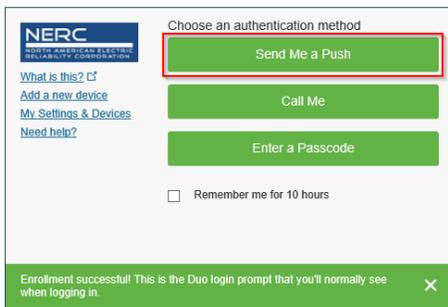
13. Open the app and tap the “+” button and scan the barcode, then click “Continue”.



14. Click “Continue to Login”.



15. Click “Send Me a Push” and follow the instructions that are sent to your phone to continue.



16. At a minimum complete the required fields (First Name, Last Name, and Business Phone) for personal information.

17. Click "Next".

Personal

Salutation	<input type="text"/>	First Name *	<input type="text" value="MIDAS"/>
Job Title	<input type="text"/>	Middle Name	<input type="text"/>
Business Phone *	<input type="text" value="770-777-7777"/>	Last Name *	<input type="text" value="Example User"/>
Fax	<input type="text"/>	Mobile Phone	<input type="text"/>



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

19. Click "Next".

My Work Address

Street 1 *	<input type="text" value="3353 Peachtree Road"/>	City *	<input type="text" value="Atlanta"/>
Street 2	<input type="text"/>	State/Province *	<input type="text" value="Georgia"/>
		ZIP/Postal Code *	<input type="text" value="30326"/>
		Country *	<input type="text" value="USA"/>



20. Click the magnifying icon.

Company

Company



A search bar with a magnifying glass icon on the right side. A hand cursor is pointing at the magnifying glass icon.

21. Choose your company:

- Type your company's name¹ in the search bar
- Click the magnifying glass or enter
- Click your company²,
- Click "Select".



Search results table with annotations:

- a**: Points to the search bar containing "NERC".
- b**: Points to the magnifying glass icon in the search bar.
- c**: Points to the "Name" column header.

✓ Name	Created On
✓ NERC Temp Account	1/20/2017 4:38 PM
NERC Tester	1/20/2017 4:38 PM
NERCSolutions.net	1/20/2017 4:38 PM



Buttons for the search process:

- d**: Points to the "Select" button.

Buttons: Remove Value, Select, Cancel

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".

22. Click “Next”

Company

Company

 ✕ 🔍

Did you find your company?

No Yes

Previous Next

23. Create two security questions then click “Save”

Security

Security Question 1 *

Security Answer 1 *

Security Question 2 *

Security Answer 2 *

 ✕

Previous Save

Requesting Access to MIDAS

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

My Applications Research

My Applications

Request Application Access

- Click "Create New Application Access Request".

Application Access Requests

Below is the list of submitted application requests. To request access to an ERO Portal application, please use the link below to submit your access request information. Your request will be submitted to the corresponding entity administrator for approval.

[+ Create New Application Access Request](#)

- Click the search icon for the Entity field.

Entity *



- Choose your company:
 - Type your company's name in the search bar
 - Click the magnifying glass or enter
 - Click your company,
 - Click "Select"

a →  b →

✓ Entity Name ↑	NERC Number ↑	Status	Address 1: City	Address 1: State/Province
Test Entity	VR000006	Active	Atlanta	GA
✓ Testing Company Name Update, LLC	NCR55555	Active	Salt Lake City	UT

c →

Remove Value d → [Select](#) [Cancel](#)

- Click the arrow for the Requested Application Role field.

Requested Application Role *



- Choose "MIDAS User" (or "MIDAS Read-Only" if read-only access is what is needed) from the dropdown.

Requested Application Role *

- CORES User
- Entity Admin
- GMD Read-Only
- GMD User
- MIDAS Read-Only
- MIDAS User**

7. Add any comments that will be sent to the Entity Admin (who will approve the request).

Requester Comments

Please provide access.

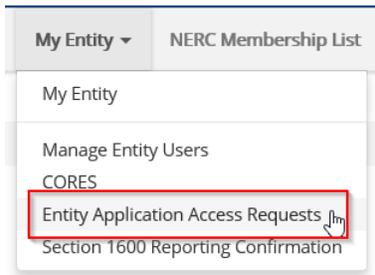
8. Confirm the information then click "Submit".



Entity Admins Only - Vet Access Requests and Manage User Permissions

Approve Access Requests

1. In the navigation bar, click "My Entity", then click "Entity Application Access Requests".



2. Review the pending Application Requests on the Application Access Requests home page.

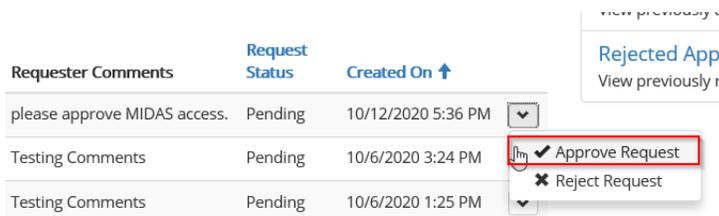
Application Access Requests

The following are the current application access requests for your registered entity. To approve or reject a request, select "Manage Access Request" from the item menu. When rejecting an access request, you must provide a reason for denying a request.

You can also view and manage all users for your entity on the [Manage Entity Page](#).

Requested By	Email Address	Phone	Requested Application Role	Requester Comments	Request Status	Created On ↑
Rachel Rieder	Rachel.Rieder@nerc.net	4044462567	MIDAS User	please approve MIDAS access.	Pending	10/12/2020 5:36 PM
Kwame Jones	kwame.jones@nerc.net		GMD User	Testing Comments	Pending	10/6/2020 3:24 PM
Kwame Jones	kwame.jones@nerc.net		GMD Read-Only	Testing Comments	Pending	10/6/2020 1:25 PM

3. Click the dropdown arrow on the right side of any pending access request and click "Approve Request".



- Add any additional comments if needed, then click “Approve Request”. The user will immediately receive access to the selected entity for the requested application.

Edit

Entity *
Test Company 2-1

Requester Comments
please approve MIDAS access.

Request Status *
Approved

Comments
You have been approved.

Approve Request

- View any previously accepted requests by clicking “Approved Application Requests” in the Menu.

Application Access Requests

The following are the current application access requests for your registered entity. To approve or reject a request, select “Manage Access Request” from the item menu. When rejecting an access request, you must provide a reason for denying a request.
You can also view and manage all users for your entity on the [Manage Entity Page](#).

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Kwame Jones	kwame.jones@nerc.net		GMD Read-Only	Testing Comments	Pending	10/6/2020 1:25 PM

Menu

- Approved Application Access Requests
View previously approved application access requests
- Rejected Application Access Requests
View previously rejected application access requests

Reject Access Requests

- In the navigation bar, click “My Entity”, then click “Entity Application Access Requests”.

My Entity ▾ NERC Membership List

- My Entity
- Manage Entity Users
- CORES
- Entity Application Access Requests
- Section 1600 Reporting Confirmation

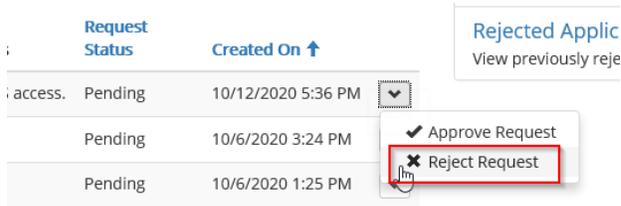
- Review the pending Application Requests on the Application Access Requests home page.

Application Access Requests

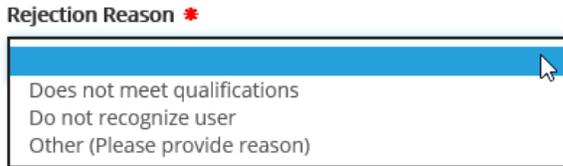
The following are the current application access requests for your registered entity. To approve or reject a request, select “Manage Access Request” from the item menu. When rejecting an access request, you must provide a reason for denying a request.
You can also view and manage all users for your entity on the [Manage Entity Page](#).

Requested By	Email Address	Phone	Requested Application Role	Requester Comments	Request Status	Created On ↑
Rachel Rieder	Rachel.Rieder@nerc.net	4044462567	MIDAS User	please approve MIDAS access.	Pending	10/12/2020 5:36 PM
Kwame Jones	kwame.jones@nerc.net		GMD User	Testing Comments	Pending	10/6/2020 3:24 PM
Kwame Jones	kwame.jones@nerc.net		GMD Read-Only	Testing Comments	Pending	10/6/2020 1:25 PM

- Click the dropdown arrow on the right side of any pending access request and click “Reject Request”.



- Click the dropdown arrow for “Rejection Reason” and select one of the three available options.



- If the selected Rejection Reason is “Other”, you must provide additional details in the “Reasons for Rejecting Request” box.

To reject the application access request, you must provide a reason in the comments section below. A notification will be sent to the requester upon denying the request.

Requested By *
Rachel Rieder

Entity *
Test Company 2-1

Requested Application Role *
MIDAS User

Requester Comments
please approve MIDAS access.

Request Status *
Rejected

Rejection Reason *
Other (Please provide reason)

Reasons for Rejecting Request
I am unsure as to why you need access. Please email me to provide further details.

- Once all applicable fields are filled in, click “Reject Request”.

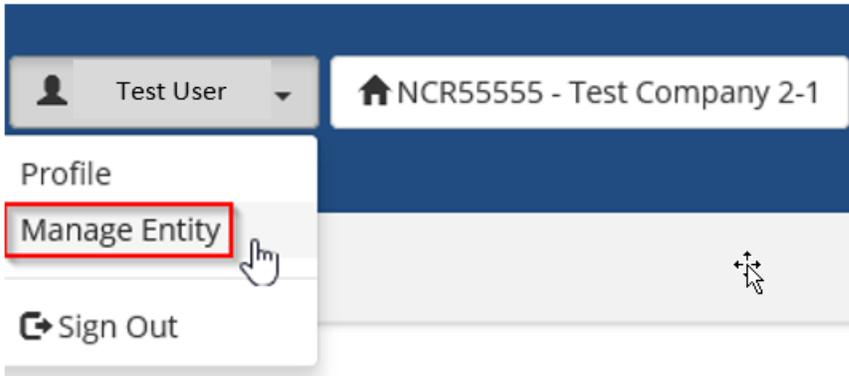


Add Users

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



- Click your name then click “Manage Entity”



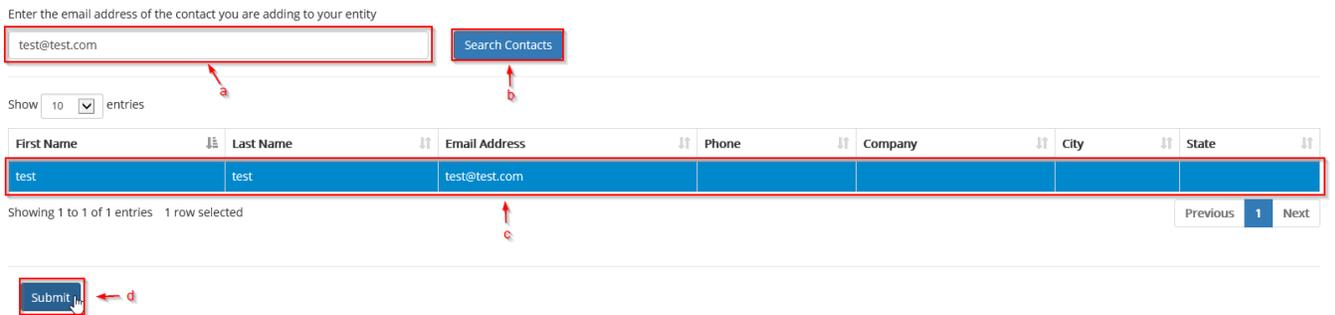
- To add a **new** contact, click “Add User”.

Manage Entity Users



- Select the user
 - In the search bar, type the email address of the user to be vetted
 - Click “Search Contacts”
 - Click their contact information
 - Click “Submit”

Add Contact to Entity



- Under “Permissions User Has”, click “Edit”.



- Select permissions the user should have then click “Submit”

User Permissions

Manage User Permissions for: Ract Test User

- CORES User
- GMD User
- GMD Read-Only
- MIDAS User
- MIDAS Read-Only
- Entity Admin
- Align Registered Entity Editor
- Align Registered Entity Reader
- Align Registered Entity Submitter

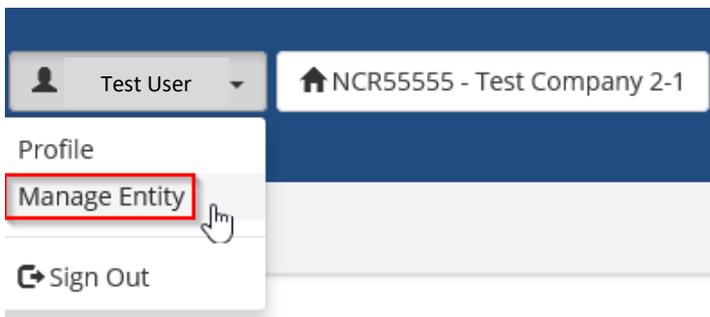
Note: MIDAS Read-Only only allows the user to view records and reports, it does not allow the user to create or modify records. MIDAS User allows the user to view, create, and edit records and reports.

Edit Existing Users

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



- Click your name then click “Manage Entity”.



- Click the name of the user that you wish to edit.

Entity Users

The following users are associated with this entity:

User	City	State	Phone	E-mail Address	Action
test.test				test@test.com	<input type="button" value="Remove User"/>

4. Click “Edit”.

User Information

User	Username	Email
test test		test@test.com

Permissions User Has

Role	Entity	NERC Number (Portal User Parent Account)	Created On ↑
MIDAS User	Test Company 2-1	NCR55555	9/16/2020 7:54 PM
MIDAS Read-Only	Test Company 2-1	NCR55555	9/16/2020 7:54 PM

[Edit](#)

5. Check any new permissions you wish to add and uncheck any permissions you wish to remove. Click “Submit”.

User Permissions

Manage User Permissions for: **Test User**

- CORES User
- GMD User
- GMD Read-Only
- MIDAS User
- MIDAS Read-Only
- Entity Admin
- Align Registered Entity Editor
- Align Registered Entity Reader
- Align Registered Entity Submitter

[Submit](#)

Remove Users

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

Test User NCR55555 - Test Company 2-1

2. Click your name then click “Manage Entity”.

Test User NCR55555 - Test Company 2-1

- Profile
- Manage Entity**
- Sign Out

3. Find the user who should be removed.
4. Click "Remove User".

Manage Entity Users

Entity Name	NERC Number
Testing Company Name Update, LLC	NCR55555

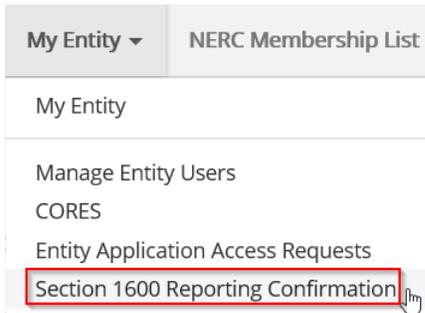
Entity Users

The following users are associated with this entity: [Add User](#)

User	City	State	Phone	E-mail Address	Action
Buzz GaTech	atlanta			margaretpate1@mailinator.com	Remove User
Jack Norris	Hometown			JackNorris2@mailinator.com	Remove User

Chapter 2: Entity Admins Only – Reporting Confirmation

1. In the navigation bar, click “My Entity”, then click “Section 1600 Reporting Confirmation”.



2. Any Generator Owner, Transmission Owner, or Distribution Provider scope for an entity will be listed in the Section 1600 Reporting Confirmation for MIDAS.

Misoperations Information Data Analysis System (MIDAS)

Transmission Owners, Generator Owners or Distribution Providers.

Reporting Obligations

Start Date	End Date	Region	Meets Criteria
11/9/2019		MRO	<input type="radio"/> Yes <input type="radio"/> No
8/1/2020		Texas RE	<input type="radio"/> Yes <input type="radio"/> No
11/8/2019		SERC	<input type="radio"/> Yes <input type="radio"/> No
7/14/2019		RF	<input type="radio"/> Yes <input type="radio"/> No
10/3/2020		NPCC	<input type="radio"/> Yes <input type="radio"/> No
10/2/2020		WECC	<input type="radio"/> Yes <input type="radio"/> No

3. Select either “Yes” or “No” for each entity scope depending on the setup of the scope. Once all rows are completed, click “Submit”.

Misoperations Information Data Analysis System (MIDAS)

Transmission Owners, Generator Owners or Distribution Providers.

Reporting Obligations

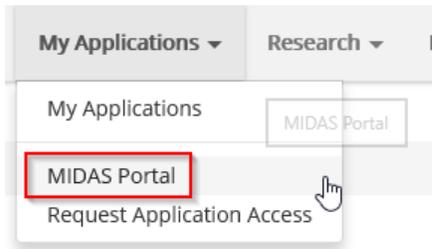
Start Date	End Date	Region	Meets Criteria
11/9/2019		MRO	<input checked="" type="radio"/> Yes <input type="radio"/> No
8/1/2020		Texas RE	<input checked="" type="radio"/> Yes <input type="radio"/> No
11/8/2019		SERC	<input checked="" type="radio"/> Yes <input type="radio"/> No
7/14/2019		RF	<input checked="" type="radio"/> Yes <input type="radio"/> No
10/3/2020		NPCC	<input type="radio"/> Yes <input checked="" type="radio"/> No
10/2/2020		WECC	<input checked="" type="radio"/> Yes <input type="radio"/> No



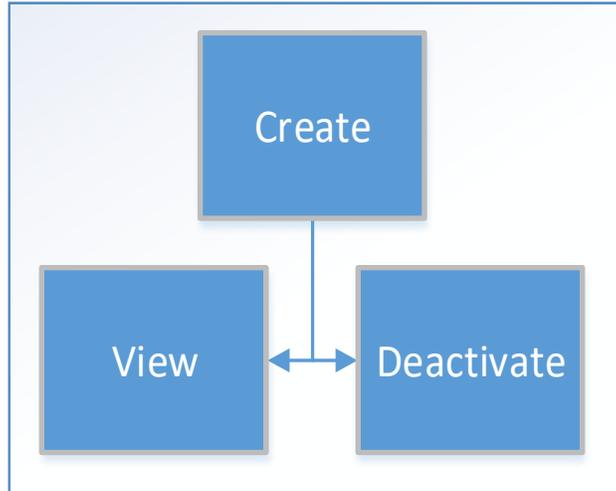
4. On December 1 of each year, the following year’s Reporting Obligation will be available to be completed.

Chapter 3: Access the MIDAS Portal

1. Navigate to the NERC ERO Portal (<https://eroportal.nerc.net/>) and login.
2. In the navigation bar, click “My Applications”, then click “MIDAS Portal”.



Chapter 4: Bulk Submission



1. Under the “Menu”, click “Bulk Submissions”.



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

Bulk Submissions

From this page, submit misoperations and protection system operations using the MIDAS Reporting Template located [here](#). Additionally, previous submissions and deactivated bulk submissions that have not been processed can both be viewed.

Note: Deactivating a Bulk Submission does not deactivate or remove processed records.

Active Bulk Submissions ▾

	Submission Date	Entity	Lead Region	Submission Quarter	Submission Year	Submitter Name	Status Reason
☑	9/14/2020 5:03 PM	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020	Rachel Rieder	Processed Successfully
☑	9/14/2020 4:53 PM	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020	Rachel Rieder	Processed Successfully
☑	9/14/2020 4:53 PM	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020	Rachel Rieder	Validation Failed

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”.

Upload Bulk Submission

Submission

Submitted By
Rachel Rieder

Entity
NCR55555 - Test Company 2-1

Select Region (Lead Region if MRRE)

Submission Year *

Submission Quarter *

Attach a file *

 Browse...


5. After a few seconds click “Refresh Status”.

MIDAS Bulk Submission Status



6. Repeat step 5 until the submission’s status indicates successful or failed.

Submission Status

Status

Validation Successful

Submission Status

Status

Validation Failed

7. If the validation failed, perform necessary corrections and resubmit the file. A file containing all related validation errors can be exported by clicking “Export to Excel”.

Validation Errors

Data Type ↑	Row ↑	Column	Value	Field Required	Status Reason	Validation Error
MisOps	2	Misoperation Category (select from drop down)	No Value	True	Active	No value was supplied for the required field
MisOps	3	Facility Voltage (select from drop down)	No Value	True	Active	No value was supplied for the required field

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 on how to submit a waiver 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
3. 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.

View Details

Status
Validation Failed

1

Submission Files

22 minutes ago
Rachel Rieder

SSMSR_1010_Errors.xlsx (143.12 KB)

2

22 minutes ago
CRMAppAccount
CRMAppAccount

PSOps 9172020 15051 PM_Errors.csv (258 bytes)

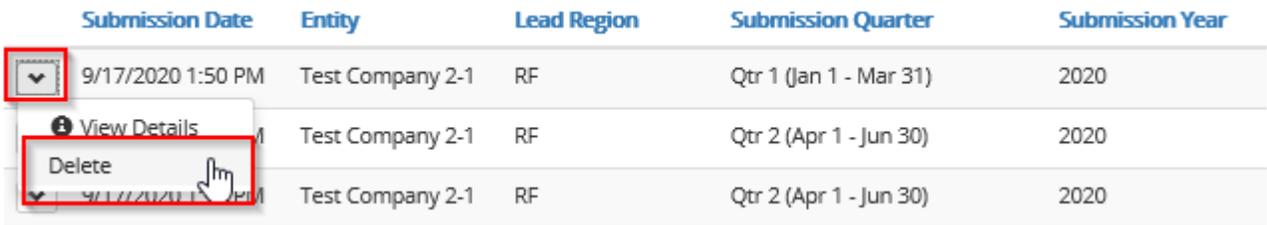
3

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.

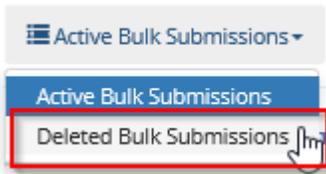
2. Click "Delete" from the dropdown options.



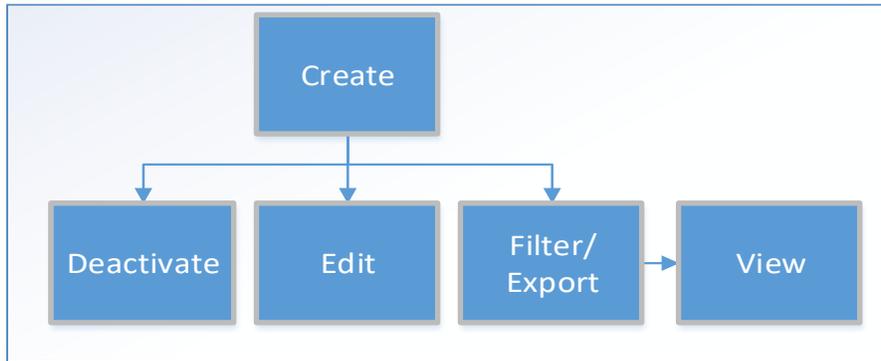
Submission Date	Entity	Lead Region	Submission Quarter	Submission Year
9/17/2020 1:50 PM	Test Company 2-1	RF	Qtr 1 (Jan 1 - Mar 31)	2020
	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020
	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020

View Deactivated Bulk Submissions

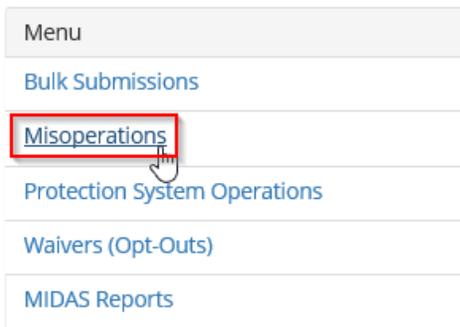
1. Click the dropdown menu, labelled "Active Bulk Submission List" by default
2. Click "Deleted Bulk Submissions"



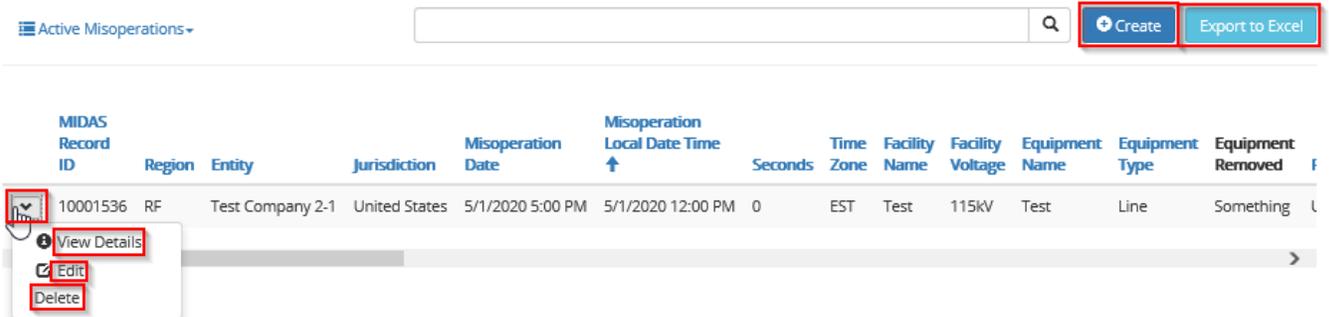
Chapter 5: Manual Misoperations



1. Under the “Menu”, click “Misoperations”.



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



Create a Manual Misoperation Record

1. Click the “Create” button.



- Complete the “New Misoperation Record” form that pops up using the information about the Misoperation. All fields with a red asterisk are required.

 Create

New Misoperation Record

Entity *

NCR55555 - Test Company 2-1

CAP Target Completion Date

Region *

CAP Actual Completion Date

Jurisdiction *

Fault Type

Misoperation Date and Time *

Restoration Method

- Click “Submit”.

 Create

Reporter's Phone Number (###) ###-#### *

This is an example of a completed [Misoperation](#) form.

Reporter's Email *

Submitted By

Rachel Rieder

Date Reported *



- 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.

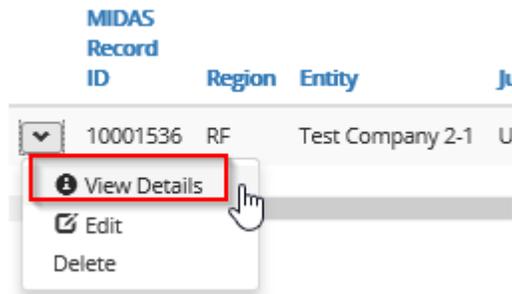
Reported By is a required field.

- Confirm that the submitted Misoperation record appears in the Active Misoperations list.

MIDAS Record ID	Region	Entity	Jurisdiction	Misoperation Date	Misoperation Local Date Time	Seconds	Time Zone	Facility Name	Facility Voltage
10001536	RF	Test Company 2-1	United States	5/1/2020 5:00 PM	5/1/2020 12:00 PM	0	EST	Test	115kV

View a Misoperation Record's Details

- Click the dropdown arrow next to the Misoperation record.
- Click "View Details" from the dropdown options.



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

View Details

Misoperation Details

ID ■

RF_NCR55555_05/01/2020_12:00:00_Test_Test

System Schemes

MIDAS Record ID

10001536

Protection Systems and Components

Something

Entity ■

Test Company 2-1

Relay Technology

Region ■

RF

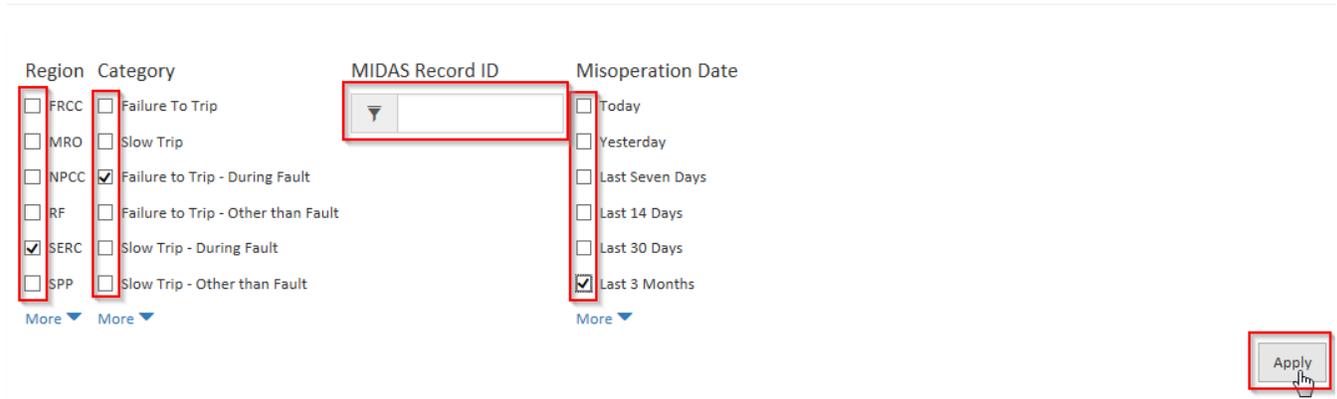
N/A

Filter and Export Misoperation Records

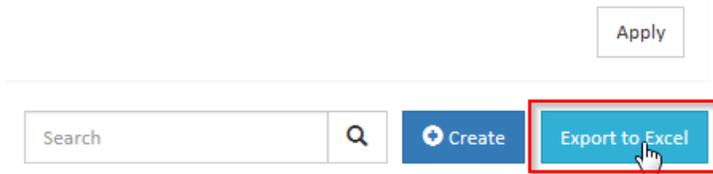
- Select filters you wish to apply to the current view

- Click "Apply". Not all filters need to be applied

Misoperations



- Click "Export to Excel"



- Open or save the exported file as desired



Modify an Existing Misoperation Record

- Click the dropdown arrow next to the Misoperation record.
- Click "Edit" from the dropdown 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 needs to be created. Locked fields are used to concatenate a unique ID.



Misoperation Details

ID

RF_NCR55555_05/01/2020_12:00:00_Test_Test

MIDAS Record ID

10001536

Entity

NCR55555 - Test Company 2-1

Region

Manual Entry

No Yes

System Schemes

Protection Systems and Components

4. Click "Submit".



Deactivate a Misoperation Record

1. Click the dropdown arrow next to the Misoperation record.
2. Click "Delete" from the dropdown selection options.

MIDAS Record ID	Region	Entity	Jurisdiction	Misoperation Date	Misoperation Local Date Time	Seconds	Time Zone
10001536	RF	Test Company 2-1	United States	5/1/2020 5:00 PM	5/1/2020 12:00 PM	0	EST

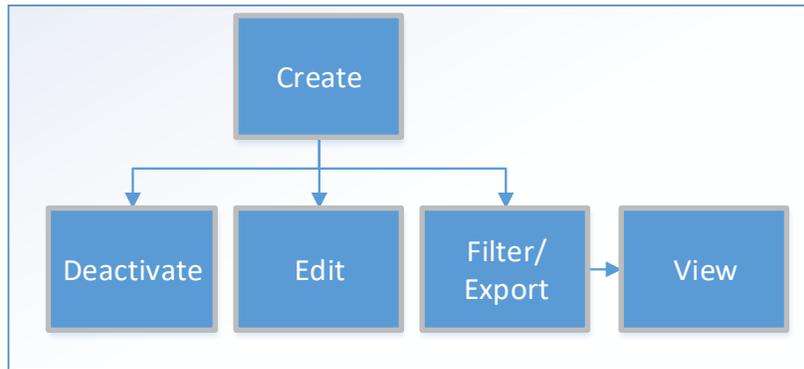
- View Details
- Edit
- Delete

View Deactivated Misoperations

1. Click "Active Misoperations".
2. Change the selection to "Inactive Misoperations".



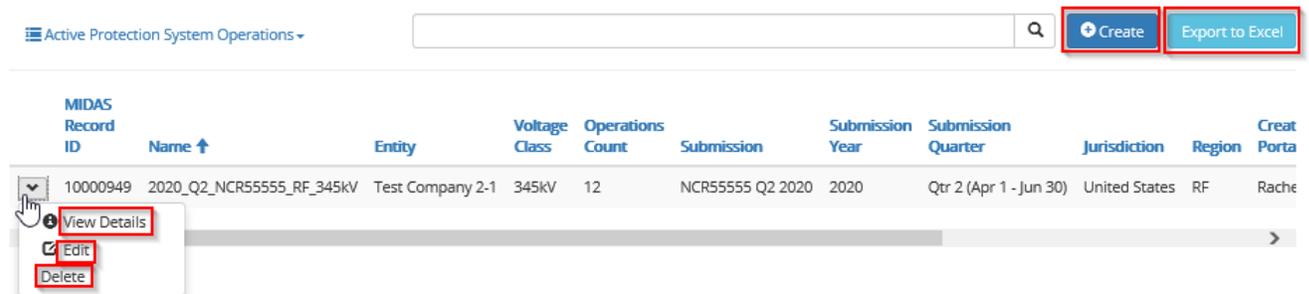
Chapter 6: Protection System Operations



1. Under the “Menu”, click “Protection System Operations”.



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



Create a Manual Protection System Operation Record

1. Click the “Create” button.



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

Create

New Protection System Operation Record

Operation Quarter * **Created By Portal User**
 Qtr 1 (Jan 1 - Mar 31) Rachel Rieder

Operation Year *
 2020

Operations Count *
 5

Voltage Class *
 138kV

3. Click "Submit".

Region *
 MRO

Jurisdiction *
 United States

Submit

4. If any errors appear correct them accordingly and repeat step 3.

i The form could not be submitted for the following reasons:

Region is a required field.

5. Confirm that the submitted Protection System Operation record appears in the Active Operations list.

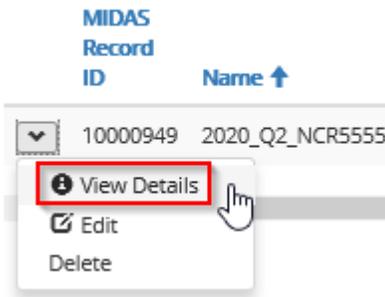
Active Protection System Operations Search

Name ↑	MIDAS Record ID	Entity	Voltage Class	Operations Count	Submission	Submission Year	Submission Quarter	Jurisdiction	Region	Validated	Created By Portal User
▼ 2017_Q2_NCR00859_SERC_138kV	7911254	Old Dominion Electric Cooperative	138kV	3	NCR00859 Q2 2017	2017	Qtr 2 (Apr 1 - Jun 30)	United States	SERC	No	MIDAS Example User

View a Protection System Operation Record's Details

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

- Click “View Details” from the dropdown options.



- Review the details of the Protection System Operation correlating with the record in a user-friendly manner.

View Details

Protection System Operation Details

Status Reason Active	Entity * Test Company 2-1
Name * 2020_Q2_NCR5555_RF_345kV	Region * RF
MIDAS Record ID 10000949	Jurisdiction * United States
Operation Quarter * Qtr 2 (Apr 1 - Jun 30)	Voltage Class * 345kV

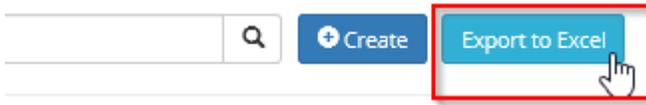
Filter and Export Protection System Operation Records

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

Protection System Operations

Region	Submission Quarter	Submission Year	MIDAS Record ID
<input type="checkbox"/> FRCC <input type="checkbox"/> MRO <input type="checkbox"/> NPCC <input type="checkbox"/> RF <input checked="" type="checkbox"/> SERC <input type="checkbox"/> SPP More	<input type="text" value="Qtr 2 (Apr 1 - Jul)"/>	<input type="text" value="2017"/>	<input type="text"/>

- Click "Export to Excel".

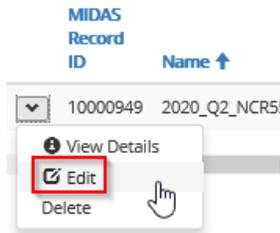


- Open or save the exported file as desired.



Modify an Existing Protection System Operation Record

- Click the dropdown arrow next to the Protection System Operation record.
- Click "Edit" from the dropdown options.



- 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.

Edit

Protection System Operation Details

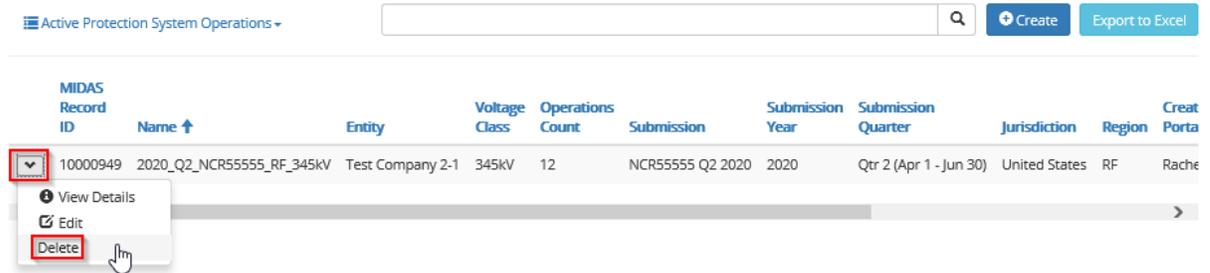
Name *	Entity *
2020_Q2_NCR5555_RF_345kV	NCR55555 - Test Company 2-1
MIDAS Record ID	Region *
10000949	RF
Status Reason	Jurisdiction *
Active	United States
Operation Quarter *	Voltage Class *
Qtr 2 (Apr 1 - Jun 30)	345kV

- Click "Submit".



Deactivate a Protection System Operation Record

1. Click the dropdown arrow next to the Protection System Operation record you wish to deactivate.
2. Click “Delete” from the dropdown options.



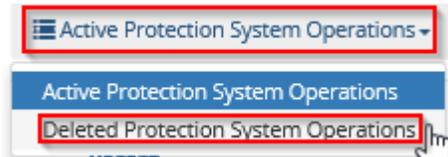
Active Protection System Operations

MIDAS Record ID	Name ↑	Entity	Voltage Class	Operations Count	Submission	Submission Year	Submission Quarter	Jurisdiction	Region	Created
10000949	2020_Q2_NCR55555_RF_345kV	Test Company 2-1	345kV	12	NCR55555 Q2 2020	2020	Qtr 2 (Apr 1 - Jun 30)	United States	RF	Rache

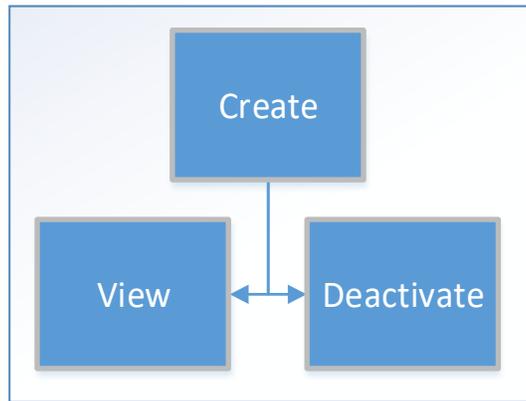
Dropdown menu options: View Details, Edit, Delete

View Deactivated Protection System Operations

1. Click “Active Protection System Operations”.
2. Change the selection to “Deleted Protection System Operations”.



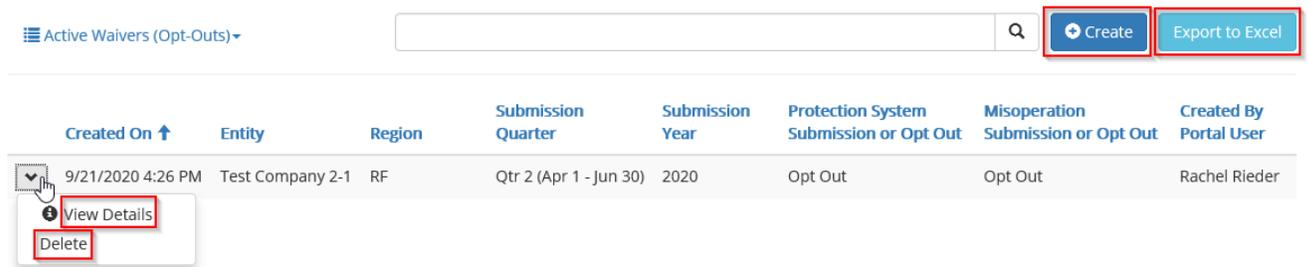
Chapter 7: Waivers (Opt-Outs)



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

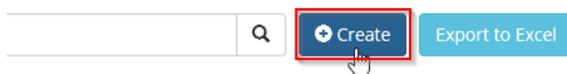


2. From this screen users are able to create, deactivate, view and export previously submitted Waivers (Opt-Outs).



Create a Waiver (Opt-Out)

1. Click the “Create” button.



2. Select the company’s region, the year and quarter.
3. Check the box to opt out of Protection System Operations (PS Ops), Misoperations (MisOps), or both.

- Click "Submit".

Create New Waiver/Opt-out Record

Entity

NCR55555 - Test Company 2-1

Region

RF

Submission Year *

2020

Submission Quarter *

Qtr 2 (Apr 1 - Jun 30)

- Protection System Operations - Opt Out
- Misoperations - Opt Out

Submitted By

Rachel Rieder



View a Waiver's (Opt-Out) Details

- Click the dropdown arrow next to the Opt-Out Waiver.
- Click "View Details" from the dropdown options.

Active Waivers (Opt-Outs)

	Created On ↑	Entity	Region	Submission Quarter	Submission Year	Protection System Submission or Opt Out	Misoperation Submission or Opt Out	Created By Portal User
▼	9/21/2020 4:26 PM	Test Company 2-1	RF	Qtr 2 (Apr 1 - Jun 30)	2020	Opt Out	Opt Out	Rachel Rieder
	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <input checked="" type="button" value="View Details"/> <input type="button" value="Delete"/> </div>							

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

Waiver (Opt-Out) Details

Name * NCR55555 - Test Company 2-1 Qtr 2 (Apr 1 - Jun 30) 2020	Created By Rachel Rieder
Entity Test Company 2-1	Created On 9/21/2020 4:26 PM
Submission Year * 2020	Updated By
Submission Quarter * Qtr 2 (Apr 1 - Jun 30)	Modified On 9/21/2020 4:26 PM
Region RF	
PS Ops - Opt In or Opt Out <input type="radio"/> Submission <input checked="" type="radio"/> Opt Out	
MisOps - Opt In or Opt Out <input type="radio"/> Submission <input checked="" type="radio"/> Opt Out	

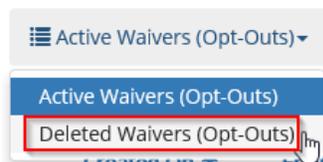
Deactivate a Waiver (Opt-Out)

- Click the dropdown arrow next to the Waiver (Opt-Out).
- Click “Delete” from the dropdown options.



View Deactivated Waivers (Opt-Outs)

- Click “Active Waivers (Opt-Outs)”.
- Click “Deleted Waivers (Opt-Outs)”.



Chapter 8: MIDAS Reports

1. Under the “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.

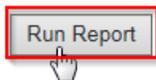
Select Entities



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



4. Click “Run Report” button.

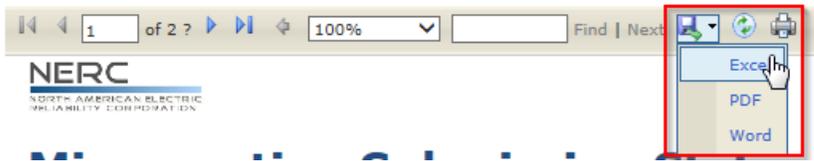


5. The Submission Status Report will provide one of the following Statuses for a given entity, region, year and quarter:
 - a. In order to receive a “Complete” status, you must have submitted one of the following combinations:
 - i. Misoperation submission(s), Protection System Operation submission
 - ii. Misoperation opt-out waiver, Protection System Operation submission
 - b. In order to receive a “Opted Out” status, you must have submitted an Opt-Out Waiver for both Misoperations and Protection System Operations

- c. The “Missing Submissions” status means you have not submitted any Misoperations, Protection System Operations or Opt-Out Waivers
- d. The “Missing Misoperations Submission/ Opt Out” status means you have submitted Protection System Operations, but have yet to submit Misoperations or an Opt Out Waiver
- e. The “Missing PSOps Submission/ Opt Out” status means you have submitted a Misoperation(s), but have yet to submit a Protection System Operation(s)

NERC ID	Entity	Region Name	Quarter	Year	Status	Misoperations		PS Operations	
						Submission	Opt Out	Submission	Opt Out
NCR55555	Test Company 2-1	MRO	Q2	2020	Missing Misoperations Submission / Opt Out	No	No	Yes	No
		NPCC	Q2	2020	Missing Submissions	No	No	No	No
		RF	Q2	2020	Opted Out	No	Yes	No	Yes
		SERC	Q2	2020	Missing Misoperations Submission / Opt Out	No	No	Yes	No
		Texas RE	Q2	2020	Missing PSOps Submission / Opt Out	Yes	No	No	No
		WECC	Q2	2020	Complete	Yes	No	Yes	No

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



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



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

