NERC
NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION

Order No. 754

Data Request Portal

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Portal Application Training
August 29, 2013

RELIABILITY | ACCOUNTABILITY




Agenda

- Administrative
- NERC Antitrust Guidelines & Disclaimer
- Navigation to Order No. 754 Portal
- Registration (Everyone)
  - New and Existing NERC Users
- Data Entry
- Closing Information
- Q & A Session

Administrative

- Presentation materials
  - Wording in this presentation is used for presentation purposes and may not reflect minor changes made to the production portal application
  - Presentation is intended to inform those Transmission Planners that are submitting data for the Order No. 754 Data Request on the functionality of the data portal
- Informal Question and Answer (Q & A) at the end
  - Q & A session will only address portal questions

NERC Anti-Trust Guidelines

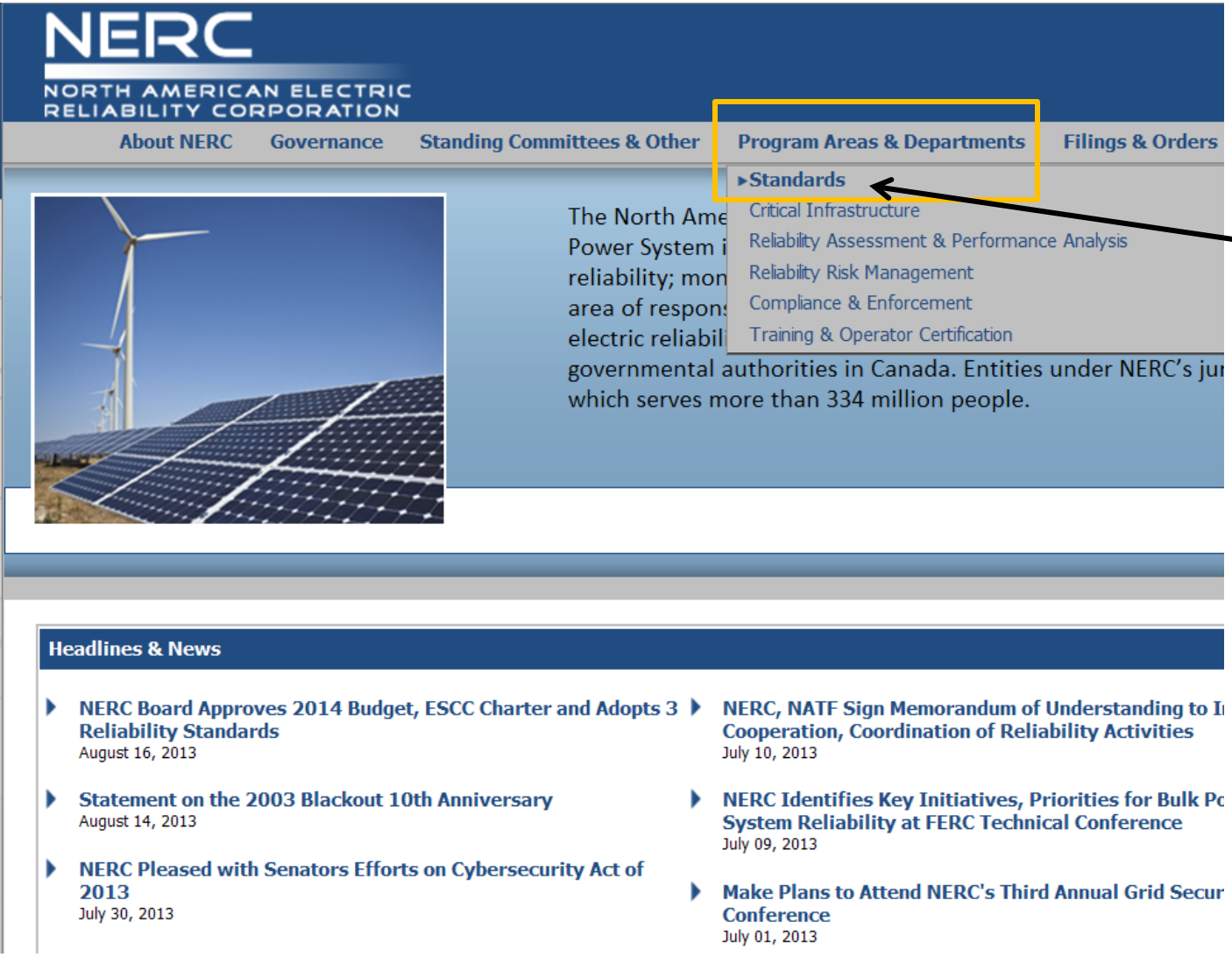
- It is NERC's policy and practice to obey the antitrust laws and to avoid all conduct that unreasonably restrains competition. This policy requires the avoidance of any conduct that violates, or that might appear to violate, the antitrust laws. Among other things, the antitrust laws forbid any agreement between or among competitors regarding prices, availability of service, product design, terms of sale, division of markets, allocation of customers or any other activity that unreasonably restrains competition. It is the responsibility of every NERC participant and employee who may in any way affect NERC's compliance with the antitrust laws to carry out this commitment.

NERC Disclaimer

- Participants are reminded that this meeting is public. Notice of the meeting was posted on the NERC website and widely distributed. The notice included the number for dial-in participation. Participants should keep in mind that the audience may include members of the press and representatives of various governmental authorities, in addition to the expected participation by industry stakeholders.

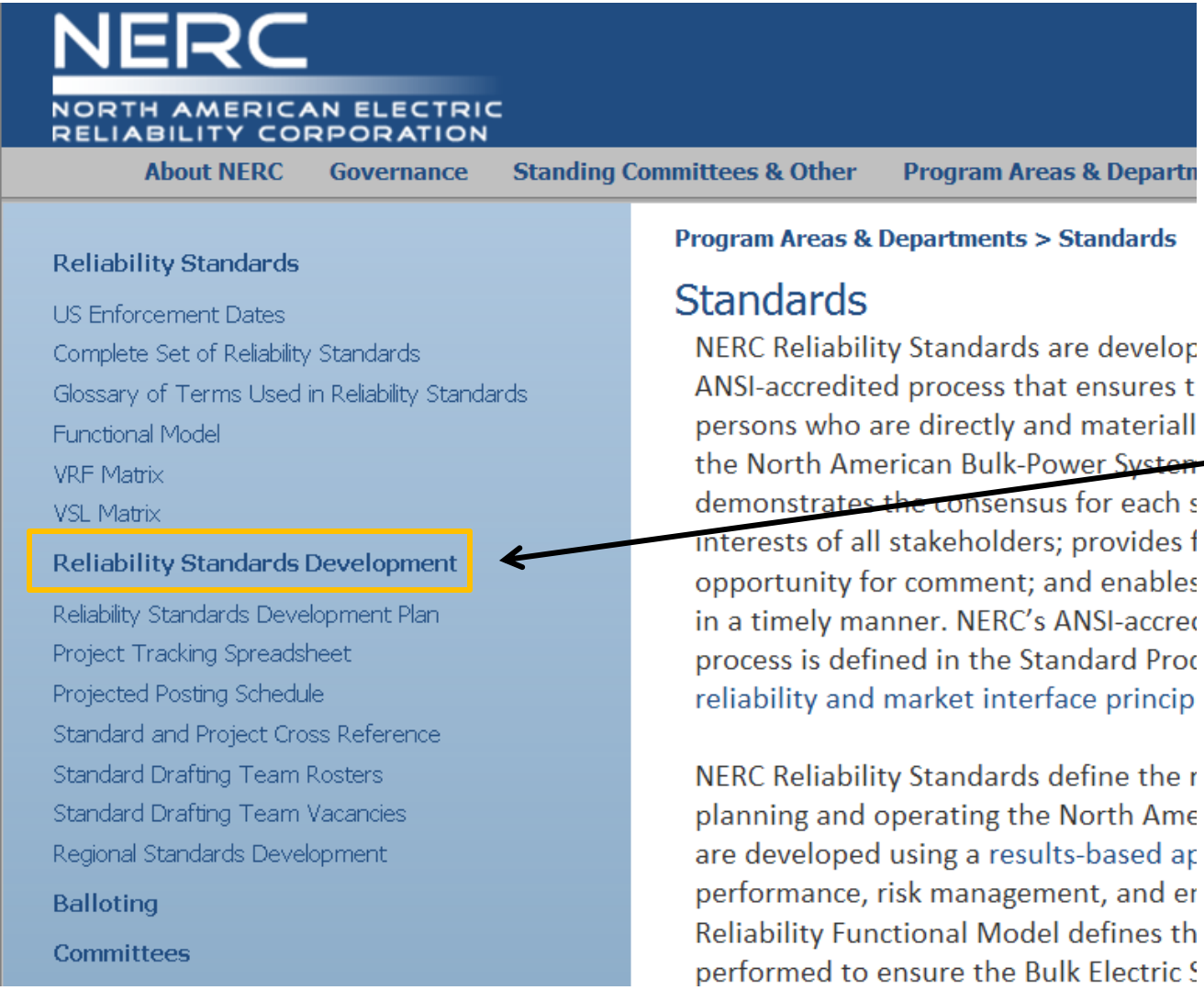
Navigation to Order No. 754 Portal

Navigation – Step 1



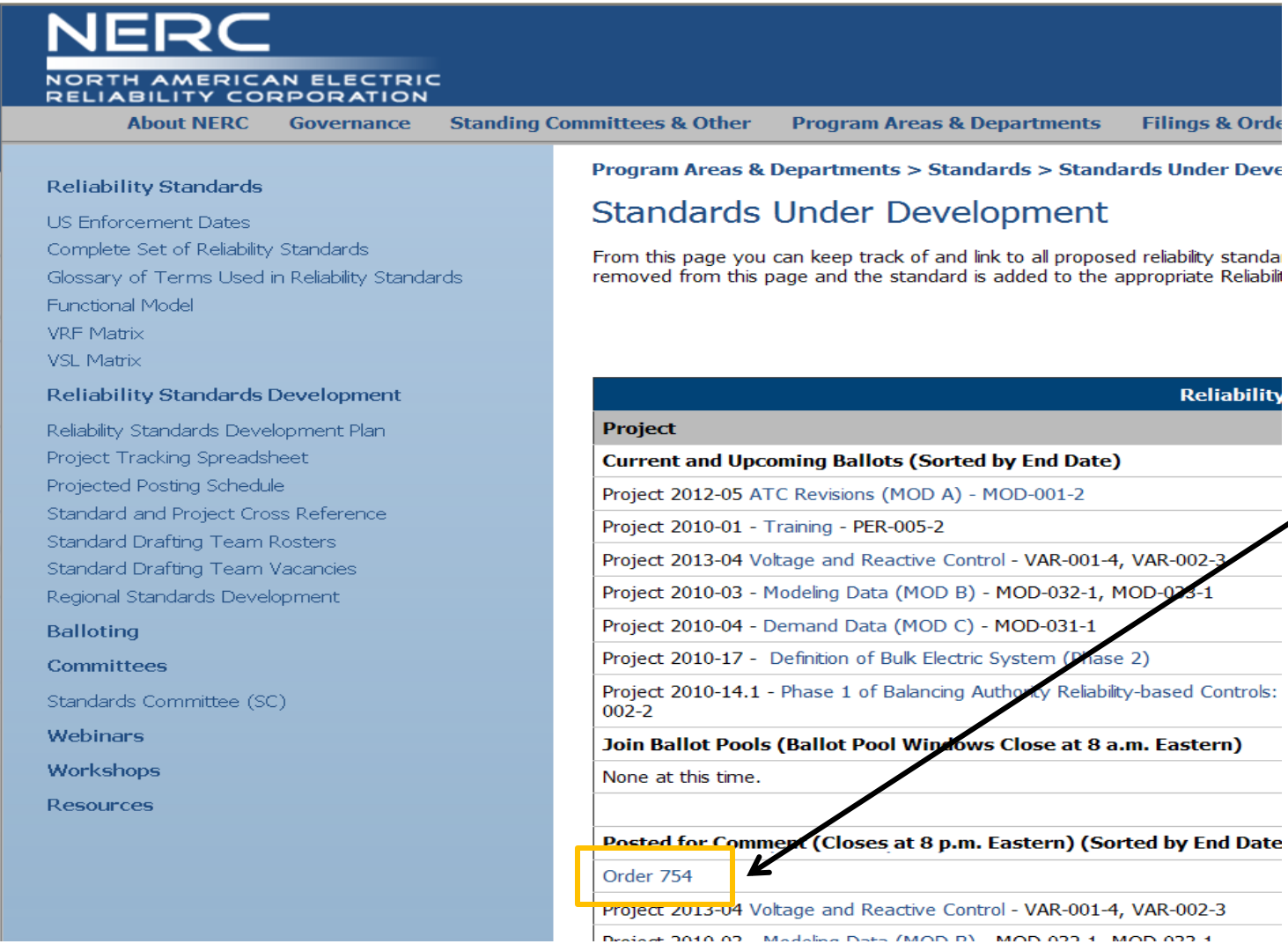
Navigate to the www.NERC.com website and select **Standards** from Program Areas & Departments

Navigation – Step 2



Once in Standards select **Reliability Standards Development** from the left navigation pane

Navigation – Step 3



Once in Standards select **Reliability Standards Development** from the left navigation pane

Navigation – Step 4

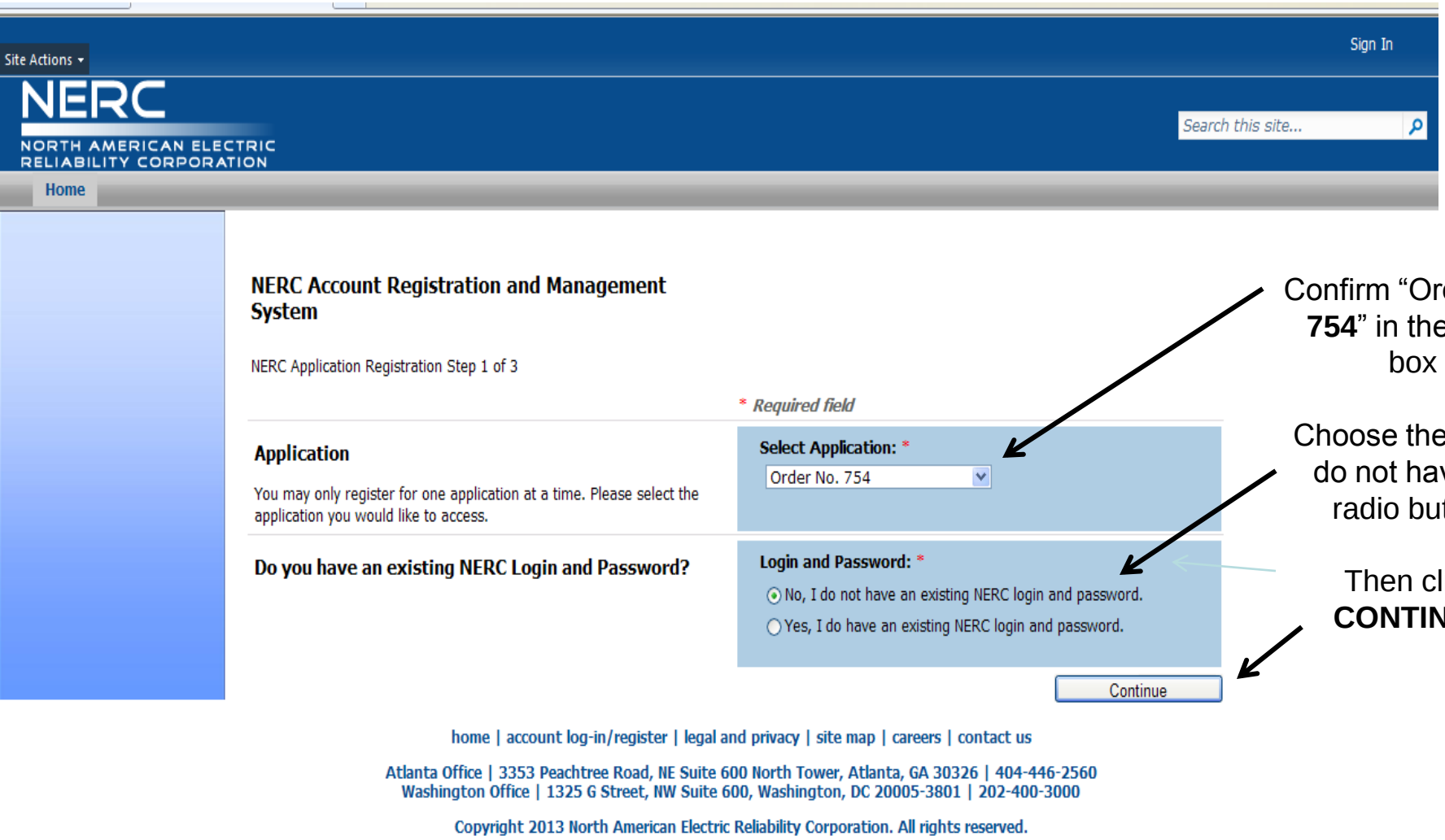
Purpose /Industry Need:
The participants in the technical conference perceived a reliability concern regarding the comprehensive assessment of potential protection system failures by registered entities. The group agreed on the need to study if a gap exists regarding the study and resolution of a single point of failure on protection systems. Note: This is not a "redundancy of protection systems" issue. The issue is, do the requirements in the transmission planning reliability standards adequately address the analysis and discovery of a protection system failure in order develop plans to meet the performance requirements for the BES (i.e. TPL-001, 002, 003, and 004).

Draft	Action	Dates	Results	Consideration of Comments
Data Reporting for buses 300 kV and above (Entities may report lower voltages)	**Data Reporting** <Register for Access to Order No. 754 Portal> <Returning Order No. 754 Portal Users>	9/3/2013 - 10/2/2013		**Technical Support** Coverage Support 8-5 p.m., ET Monday – Friday To open an IT Help Desk ticket, email: support@nerc.net **Email must contain**: Requestor's name Company name Phone number Region Description of issue Name of application (e.g., Order 754)
Data Request Six-month Status Report Unofficial Comment Form (Word)	Reporting Period Report Status Here>> Info>>	1/28/2013-3/4/2013	Six-Month Status Report>>	

Select the **Register for Access to Order No. 754 Portal** link

New NERC User Registration

New NERC User – Step 1

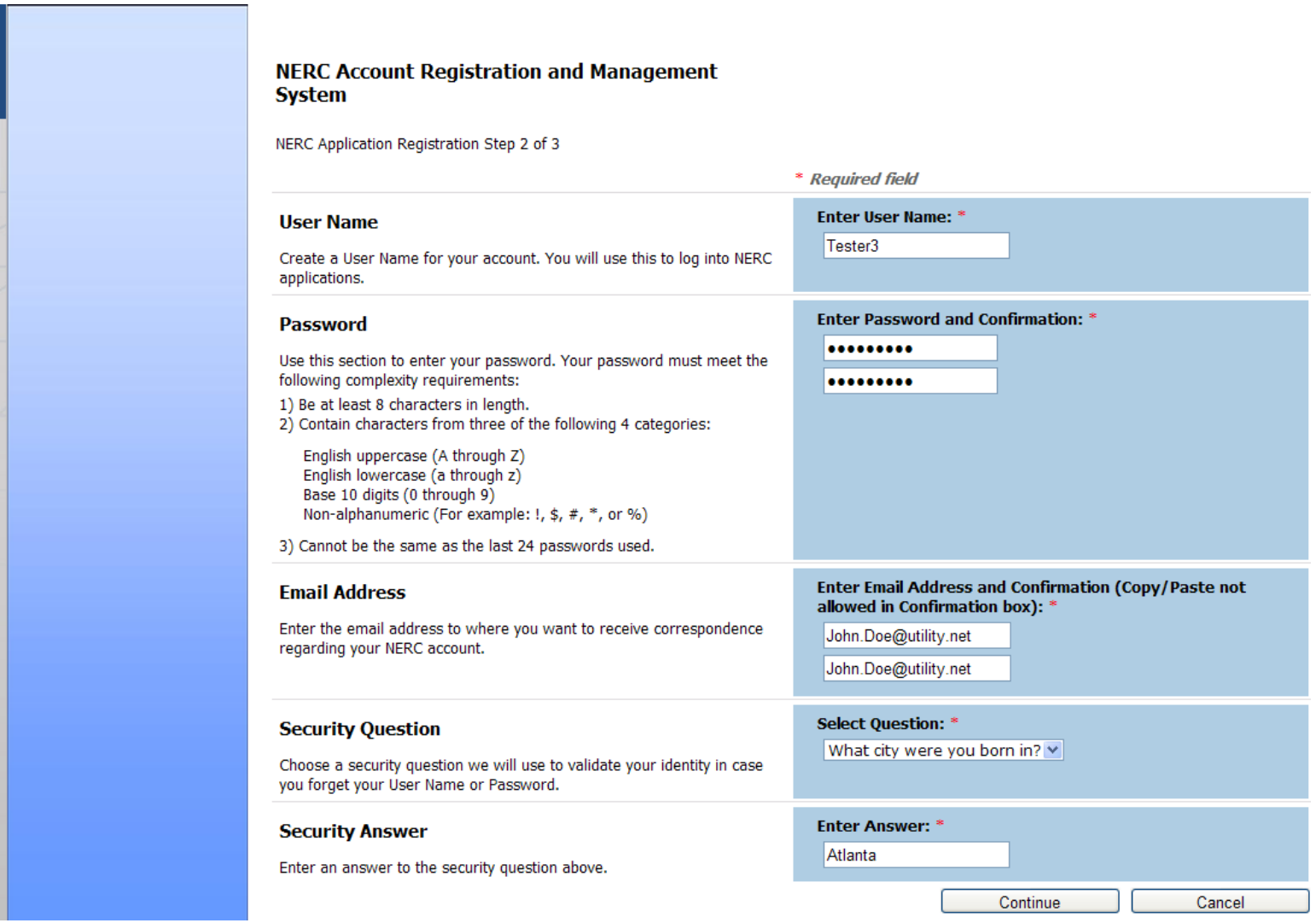


Confirm "Order No. **754**" in the drop box

Choose the "**No**, I do not have…" radio button

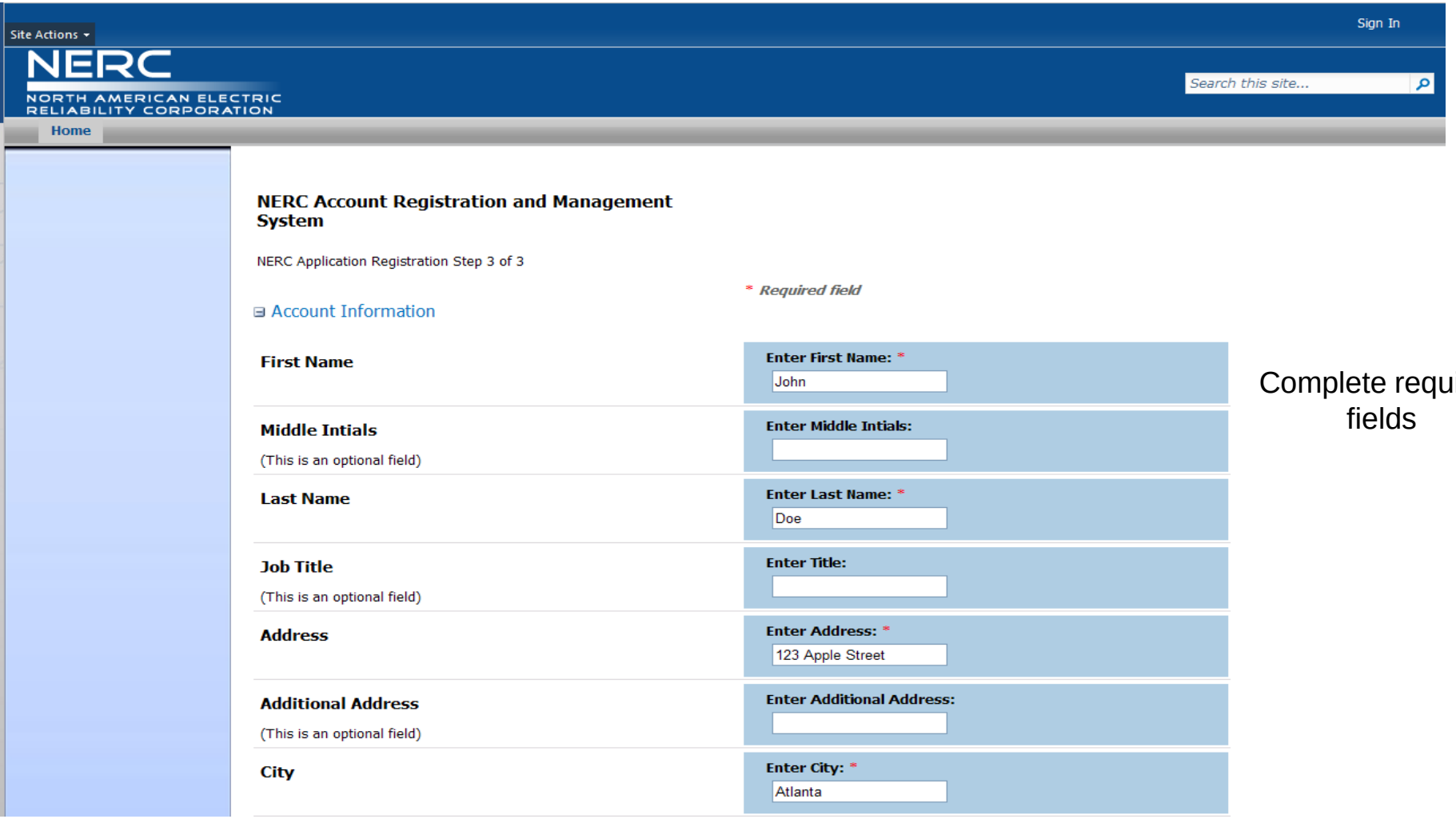
Then click **CONTINUE**

New NERC User – Step 2



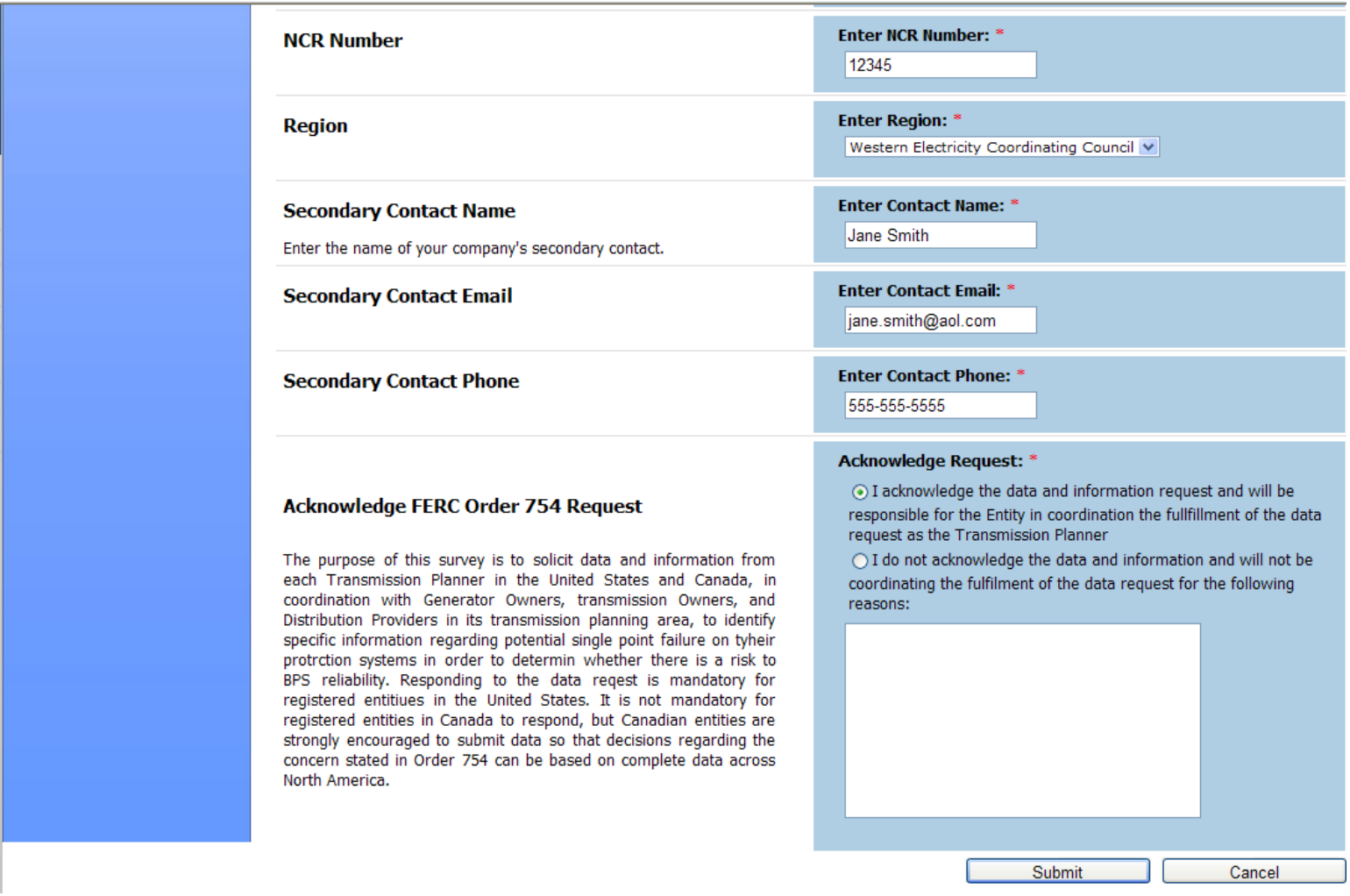
Complete the **required fields** and click **CONTINUE**

New NERC User – Step 3



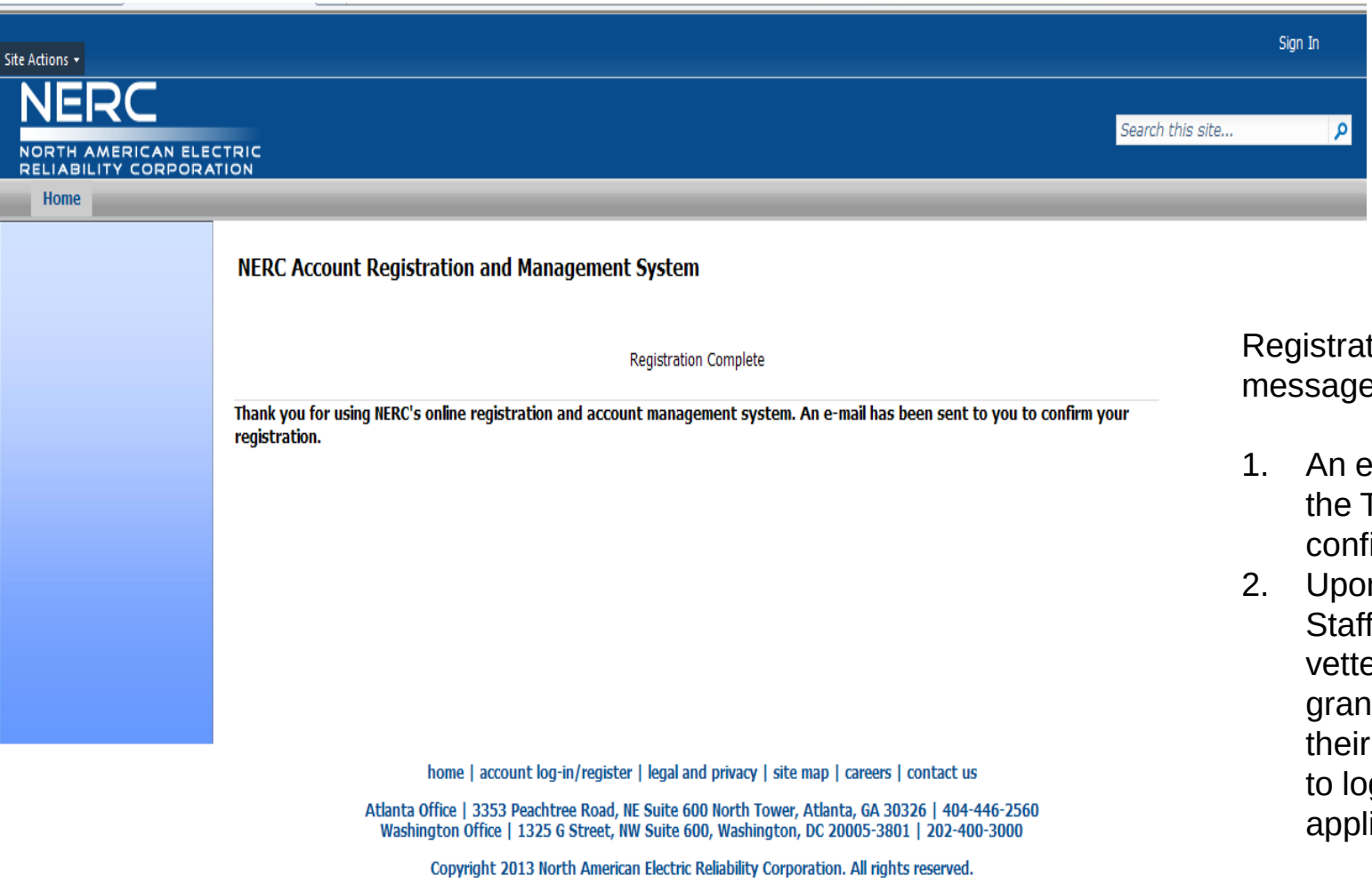
Complete required fields

New NERC User – Step 4



Complete the required fields and click SUBMIT

New NERC User – Step 5

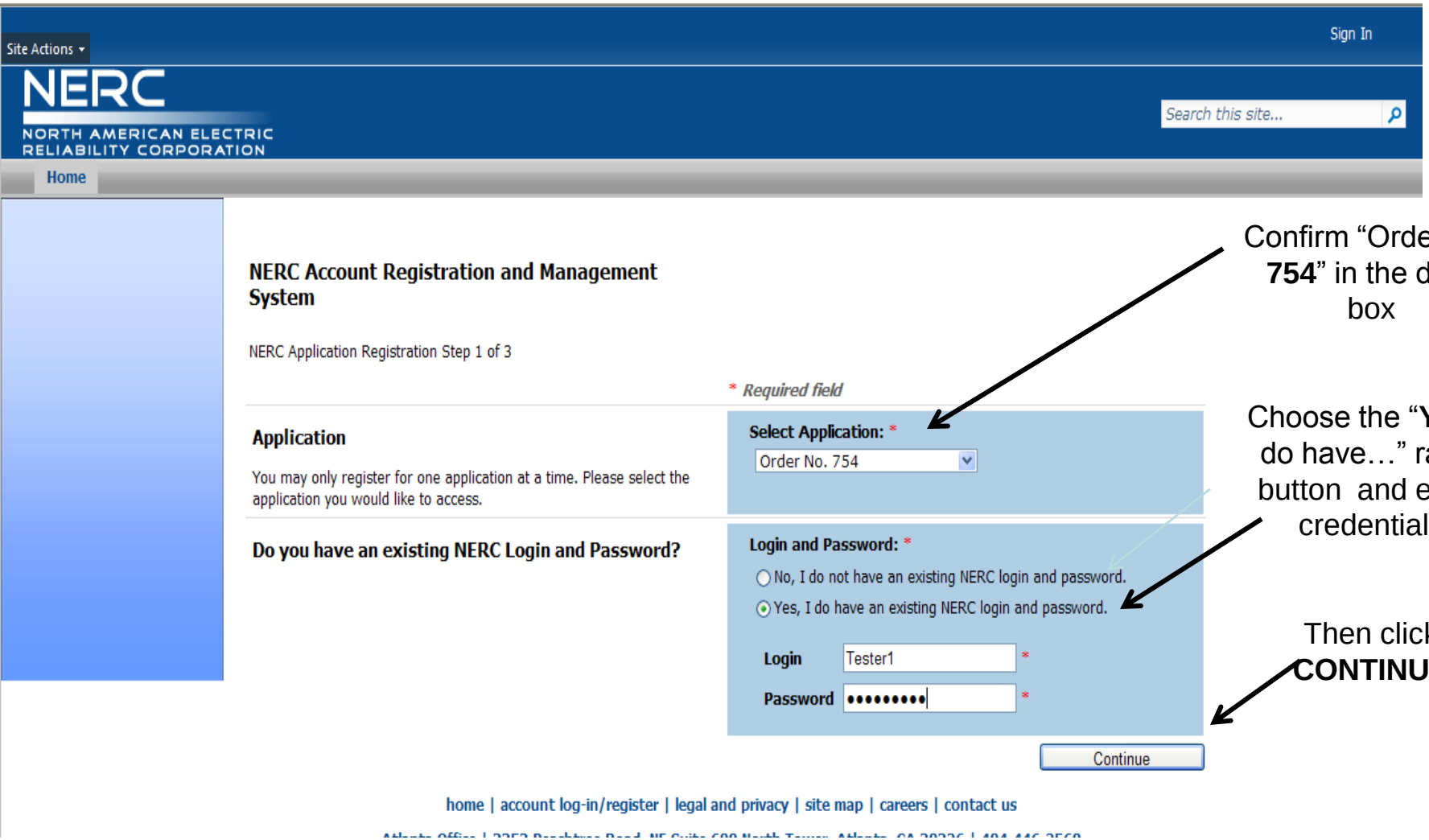


Registration confirmation message displays:

1. An email is generated to the Transmission Planner confirming registration
2. Upon review by NERC Staff, the user will be vetted prior to being granted access to use their account credentials to login to Order No. 754 application

Existing NERC User Registration

Existing NERC User – Step 1

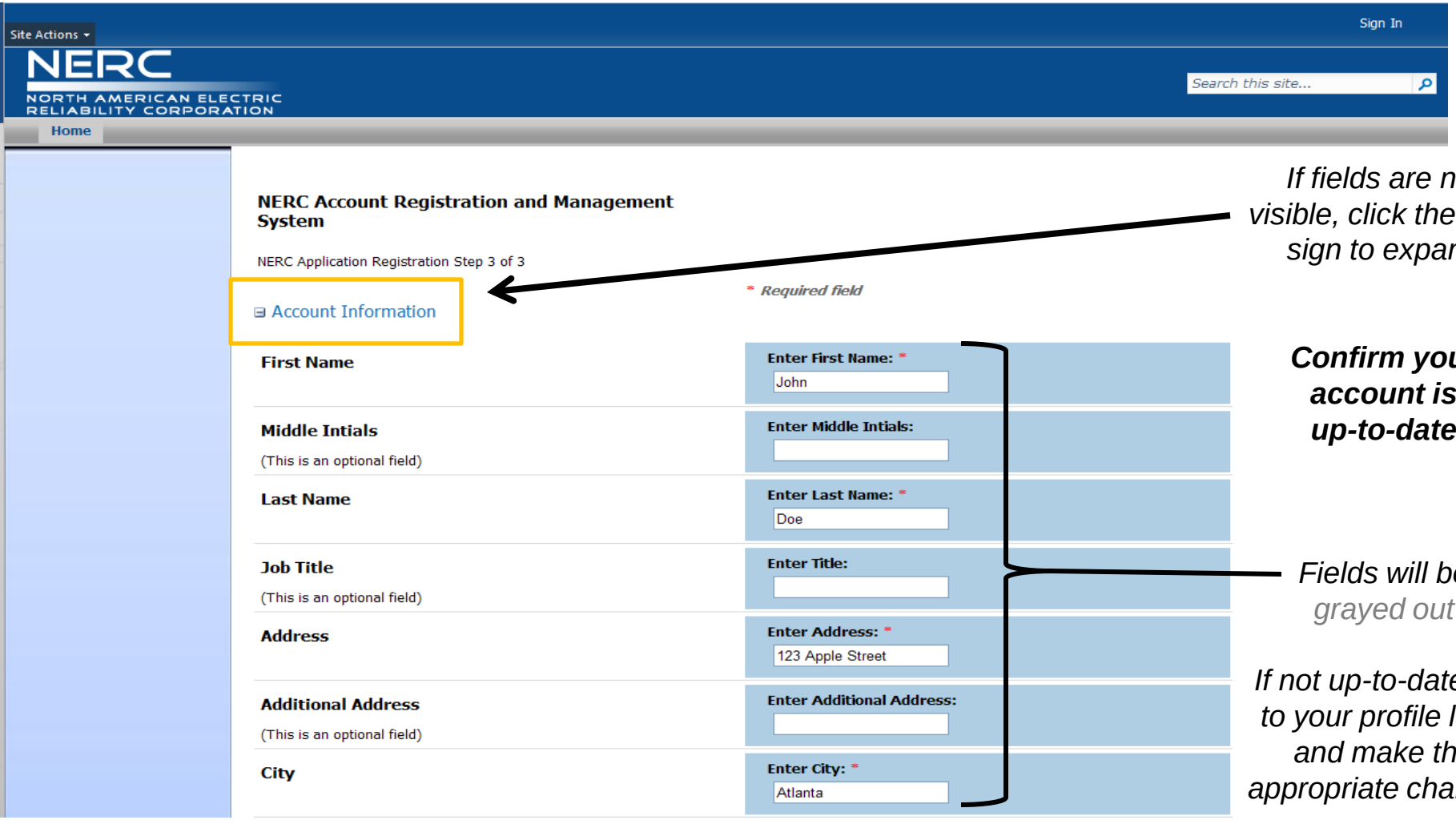


Confirm "Order No. **754**" in the drop box

Choose the "**Yes**, I do have…" radio button and enter credentials

Then click **CONTINUE**

Existing NERC User – Step 2



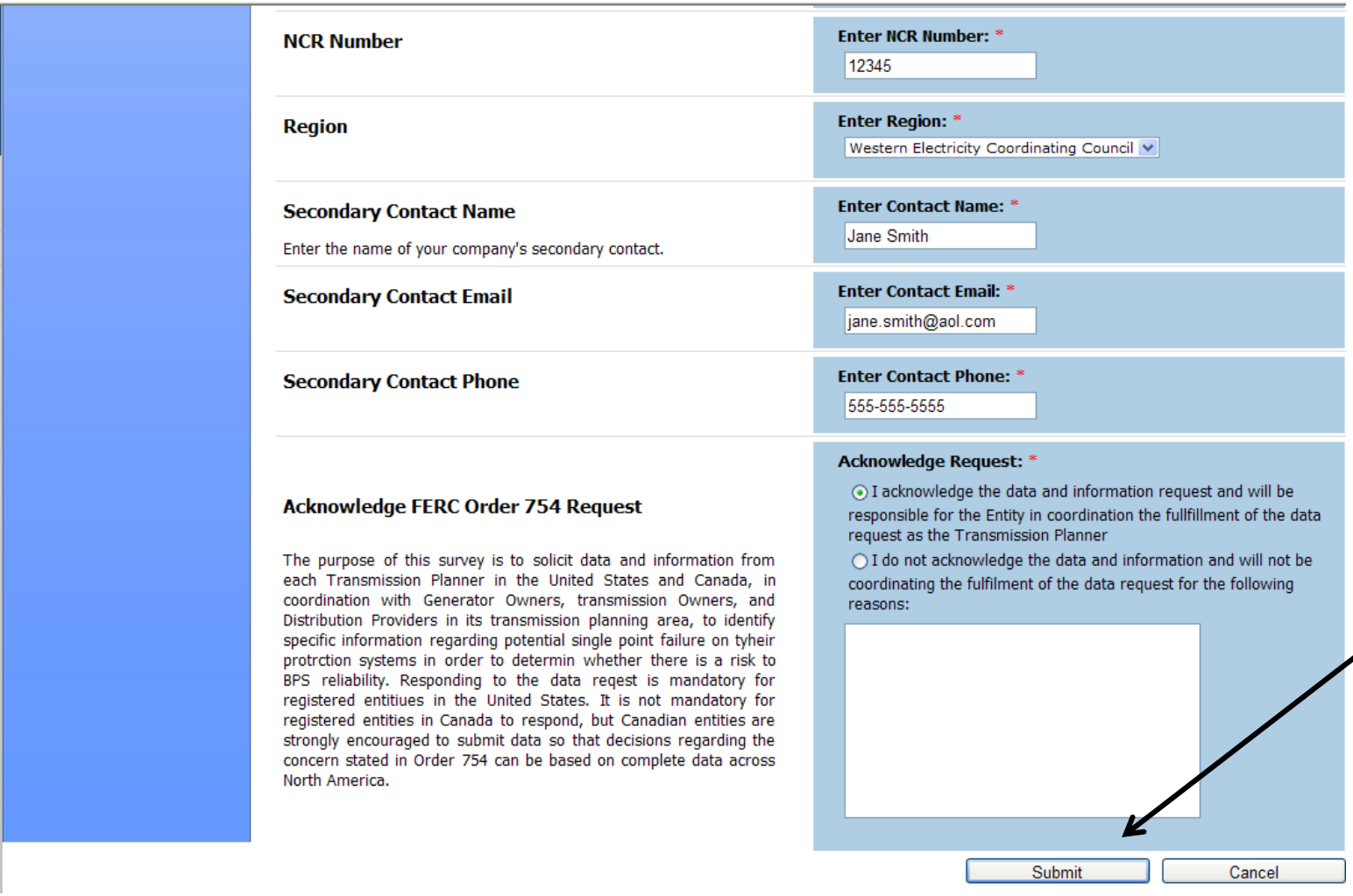
If fields are not visible, click the plus sign to expand

Confirm your account is up-to-date

Fields will be grayed out

If not up-to-date, go to your profile later and make the appropriate changes

Existing NERC User – Step 3

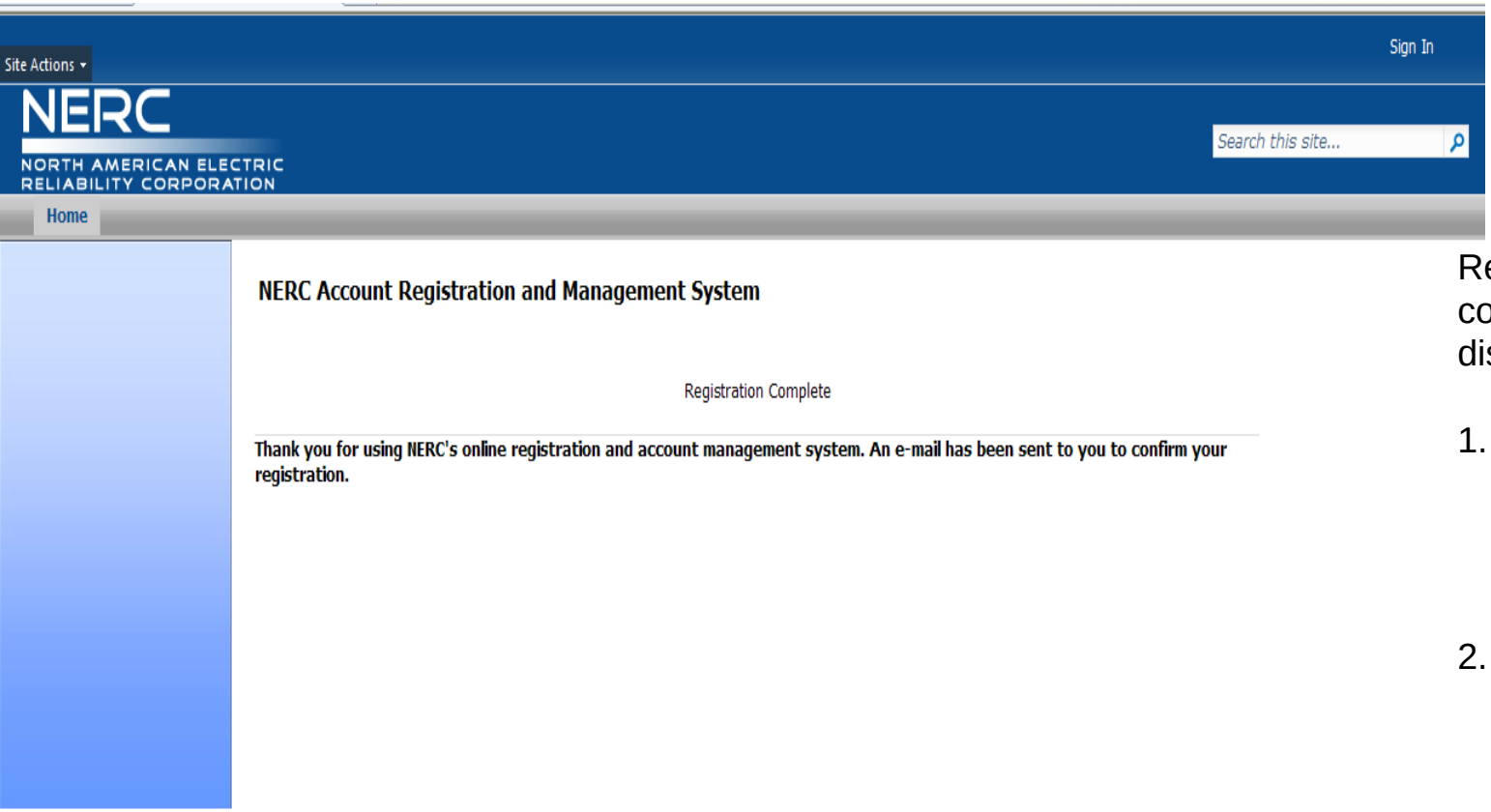


Confirm secondary contact information

Update, if necessary

Then click SUBMIT

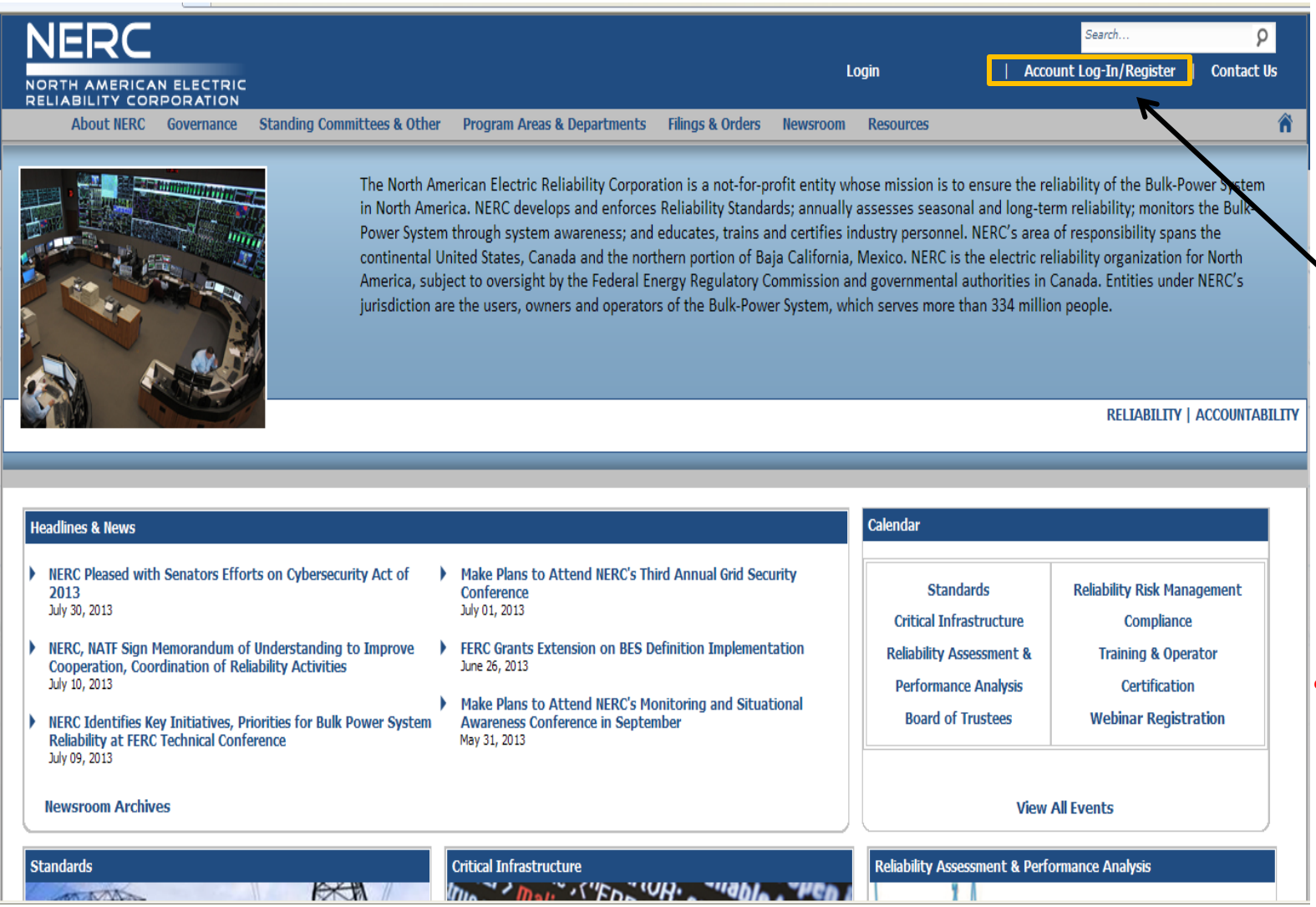
Existing NERC User – Step 4



Registration confirmation message displays:

1. An email is generated to the Transmission Planner confirming registration
2. Upon review by NERC Staff, the user may be granted access to use their account credentials to login to Order No. 754 application

Warning



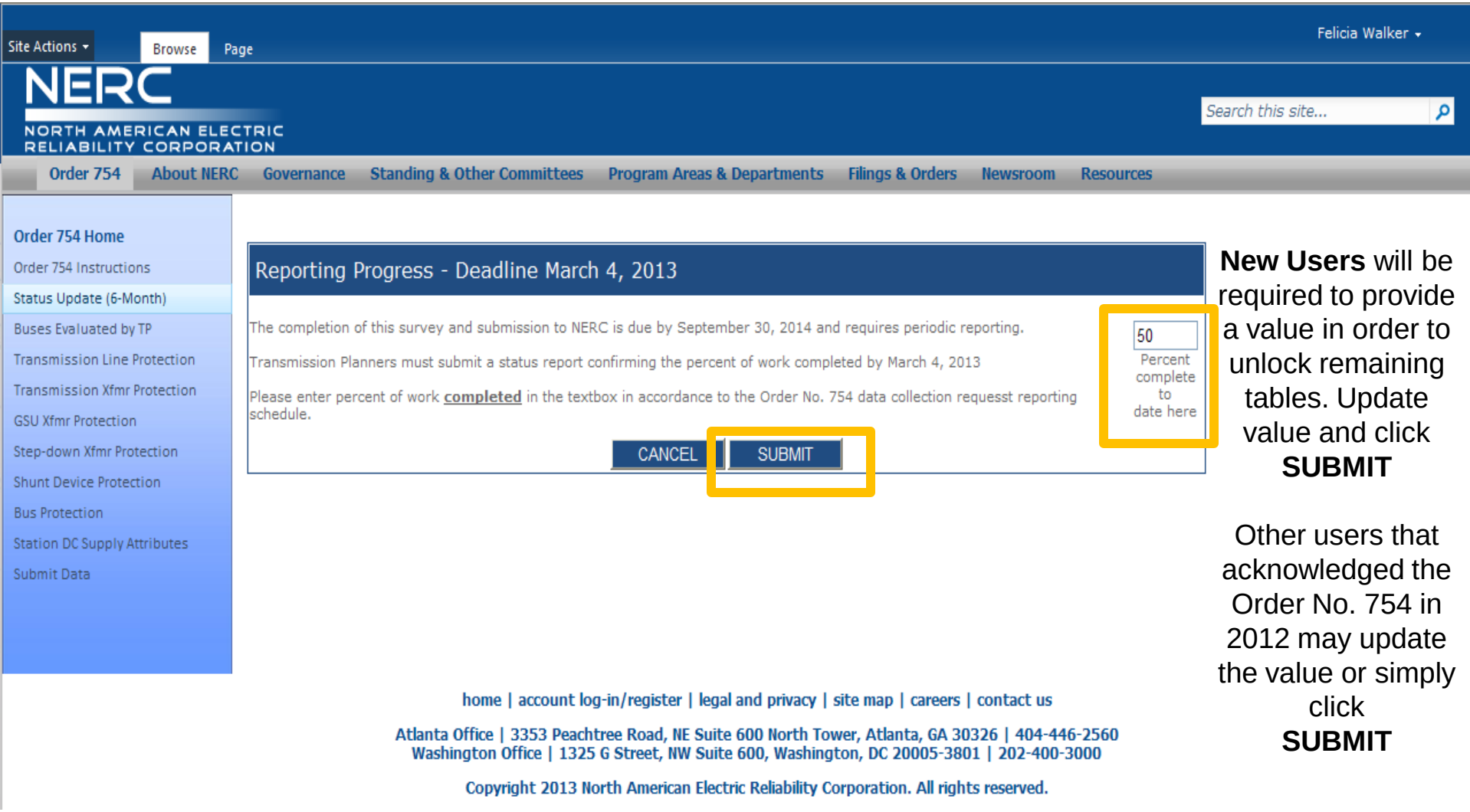
Do not use the typical login found on the NERC website.

The Order No. 754 application runs on a separate platform from these other NERC accounts.

However, your existing NERC account may still be used for the Order No. 754 application

Data Entry

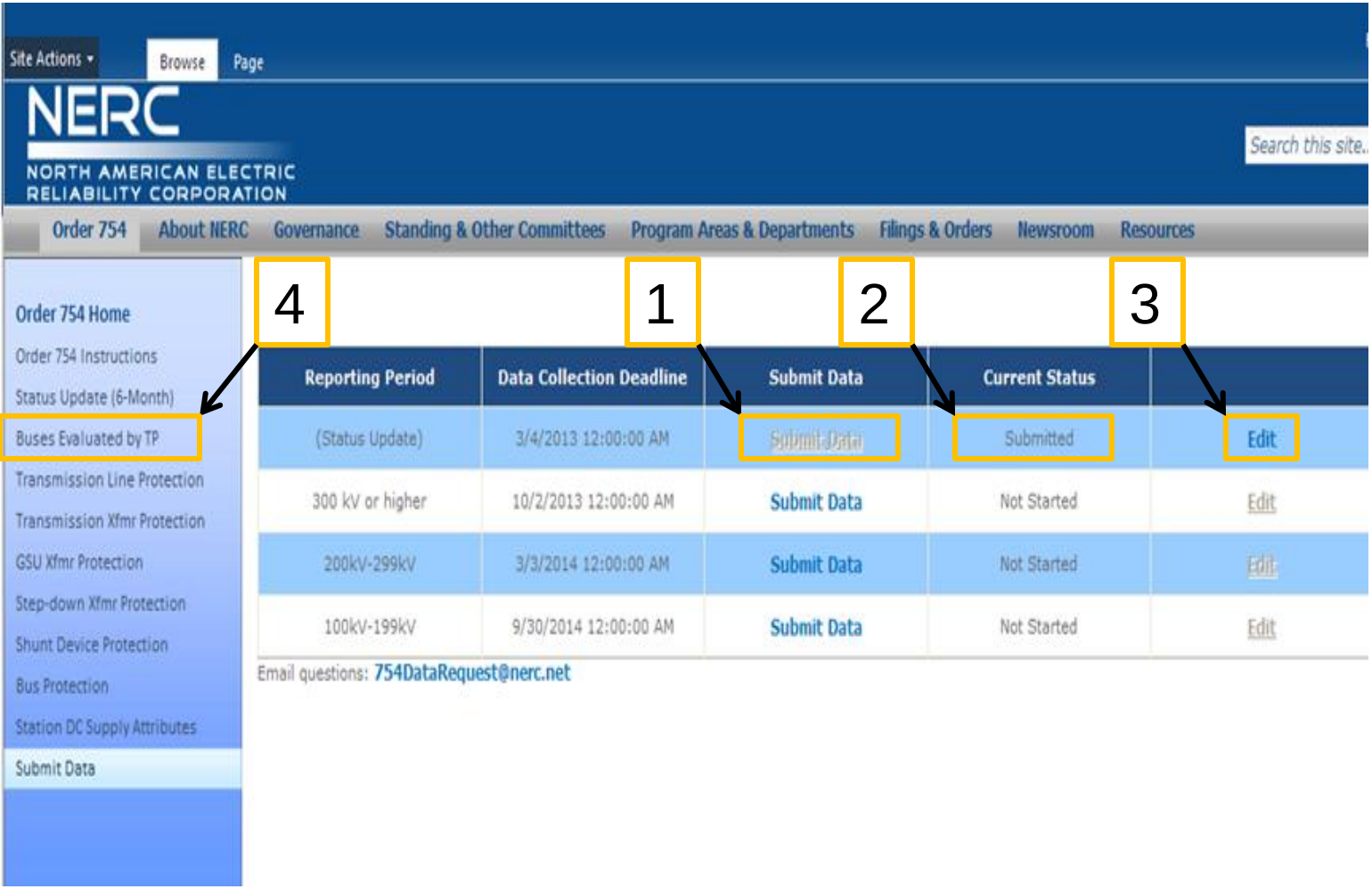
Data Entry – Status



New Users will be required to provide a value in order to unlock remaining tables. Update value and click **SUBMIT**

Other users that acknowledged the Order No. 754 in 2012 may update the value or simply click **SUBMIT**

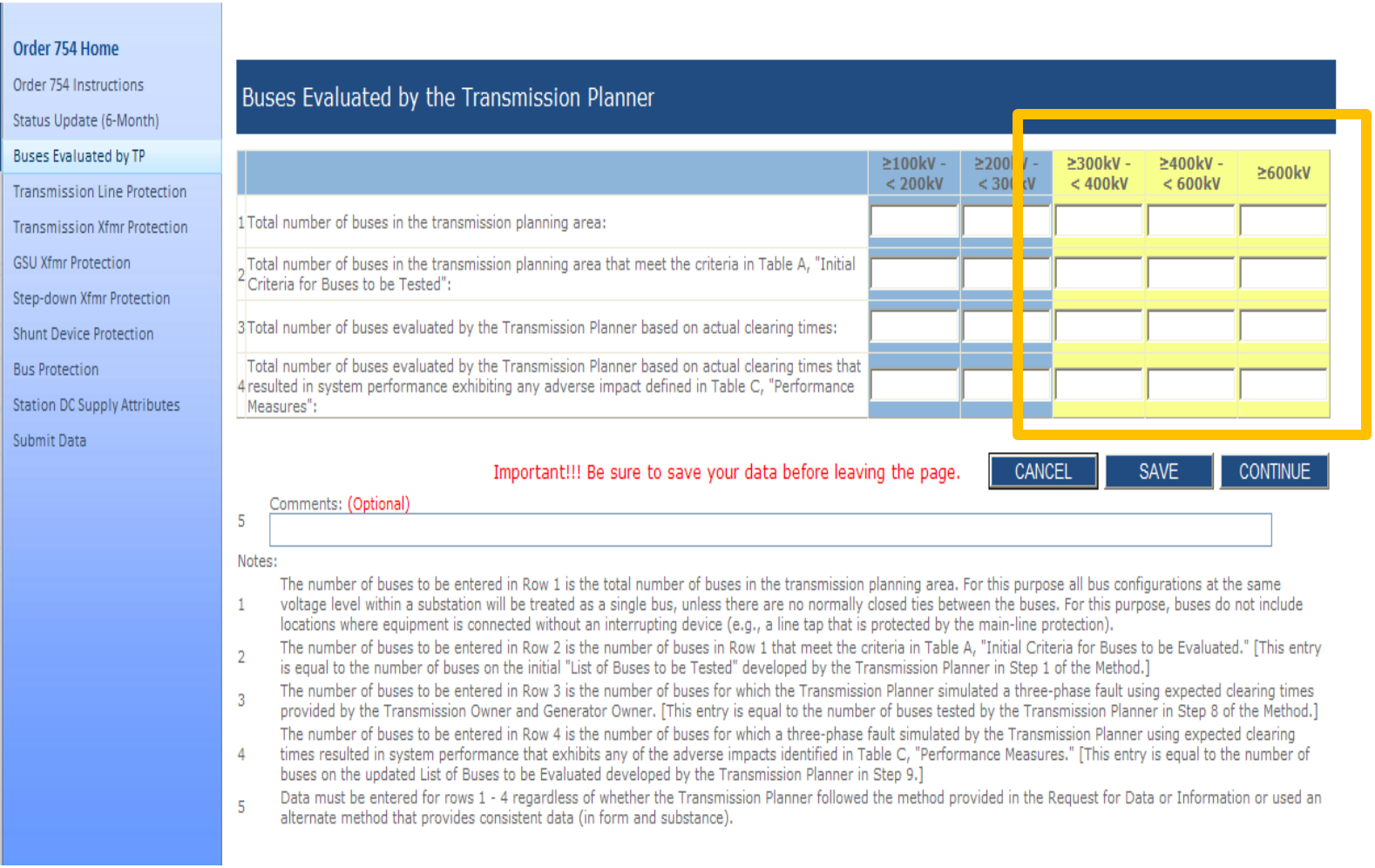
Data Entry – Submit Status



1. Upon clicking **Submit Data**
2. The Status Column updates to "**Submitted**"
3. Ability to edit previously submitted data may be done by clicking "**Edit**"
4. Start entering data by clicking on the first table set "Buses Evaluated by TP

*An **email** is generated to the user confirming submission.*

General Data Entry

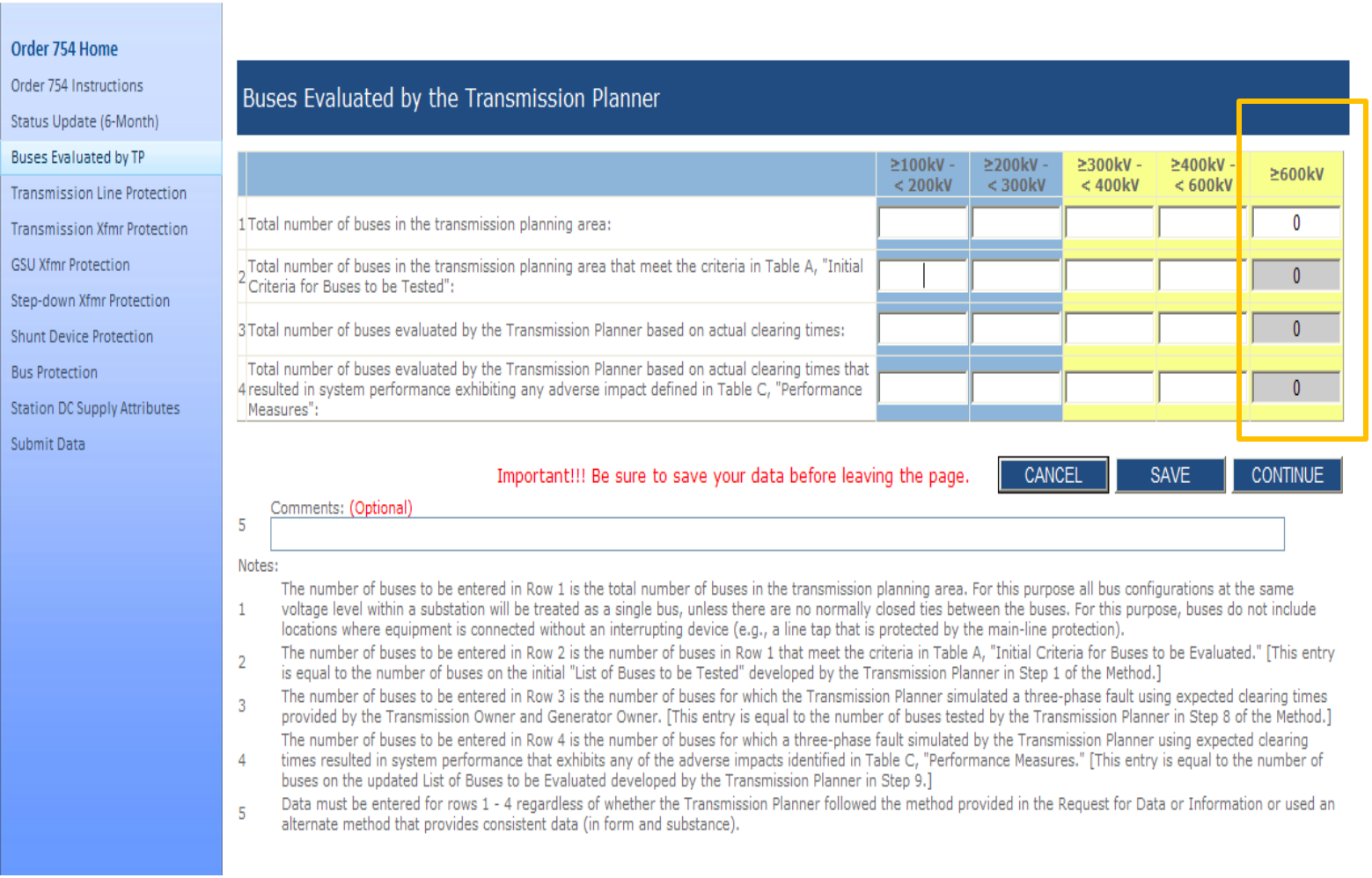


The slides will focus on the current reporting period.

User must click **SAVE** or **CONTINUE** before navigating to another table.

Not doing so will result in data not being saved.

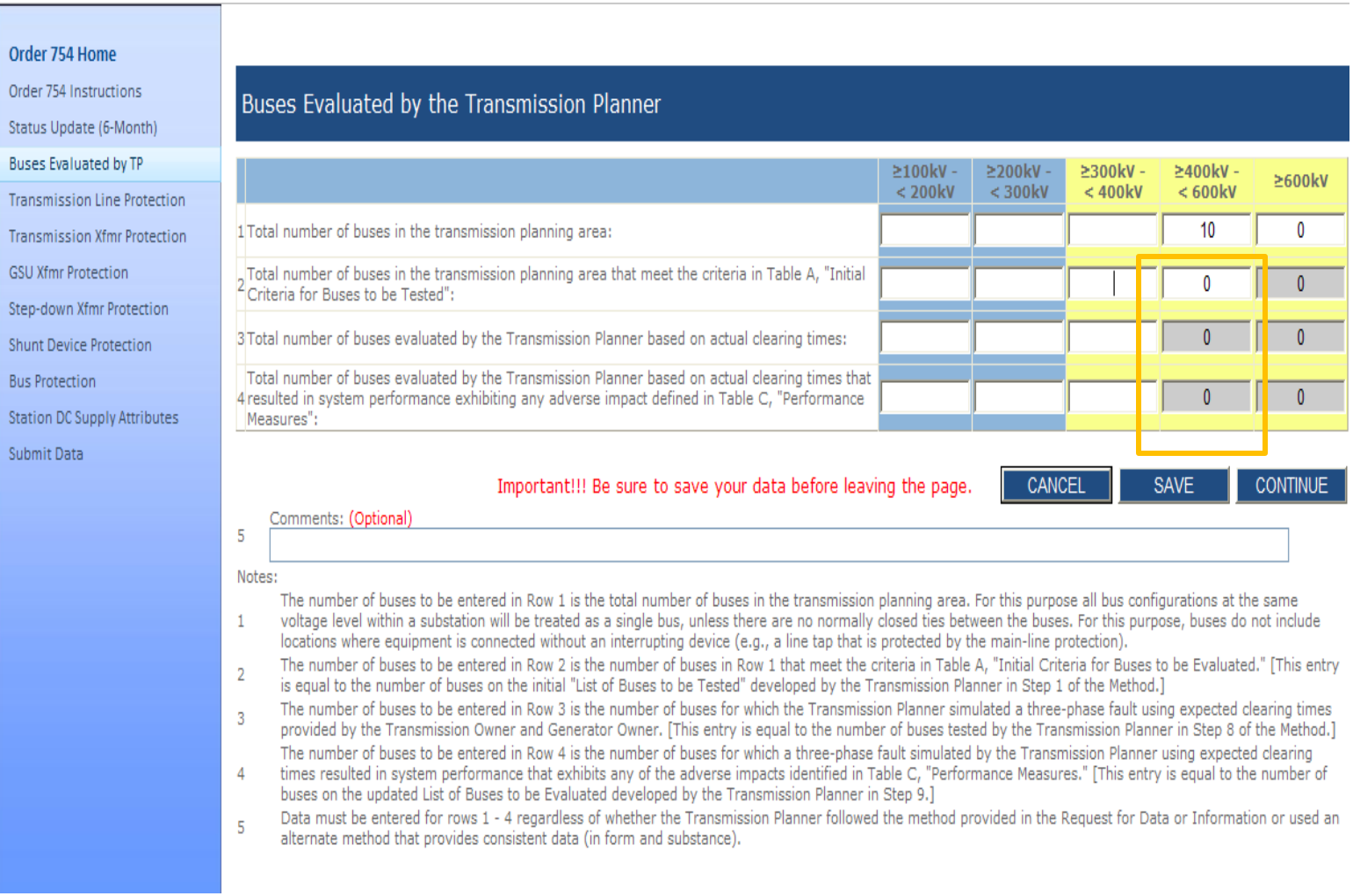
Data Entry – Prepopulation



Prepopulation Row 1 –

Zero buses in row 1 will auto-populate the remaining tables. There is no need to continue to other tables for the given column (i.e., voltage)

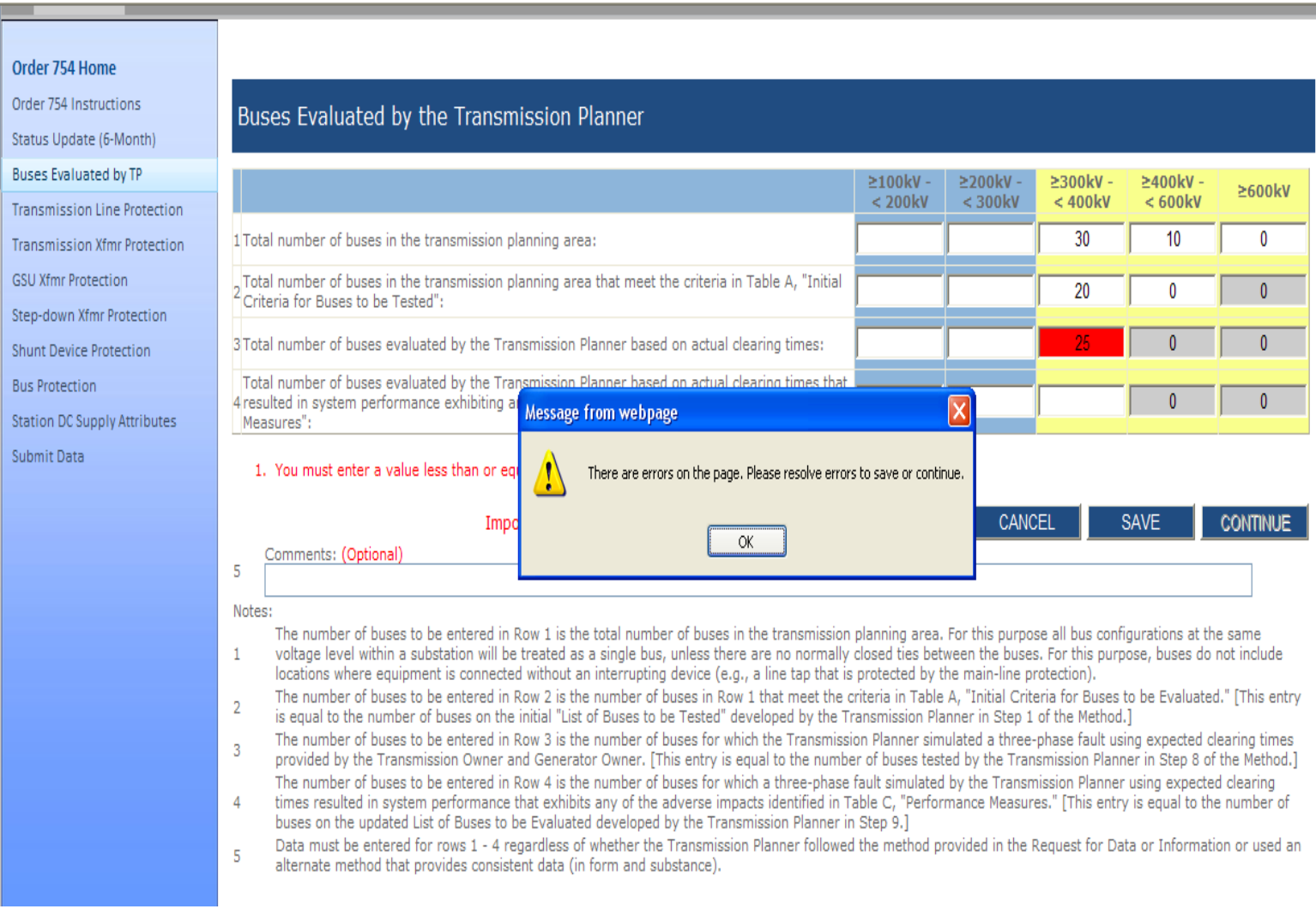
Data Entry – Prepopulation Continued



Prepopulation Row 2–

Zero buses in row 2 will auto-populate the remaining tables. There is no need to continue to other tables for the given column (i.e., voltage)

Data Entry – Data Rule(s)

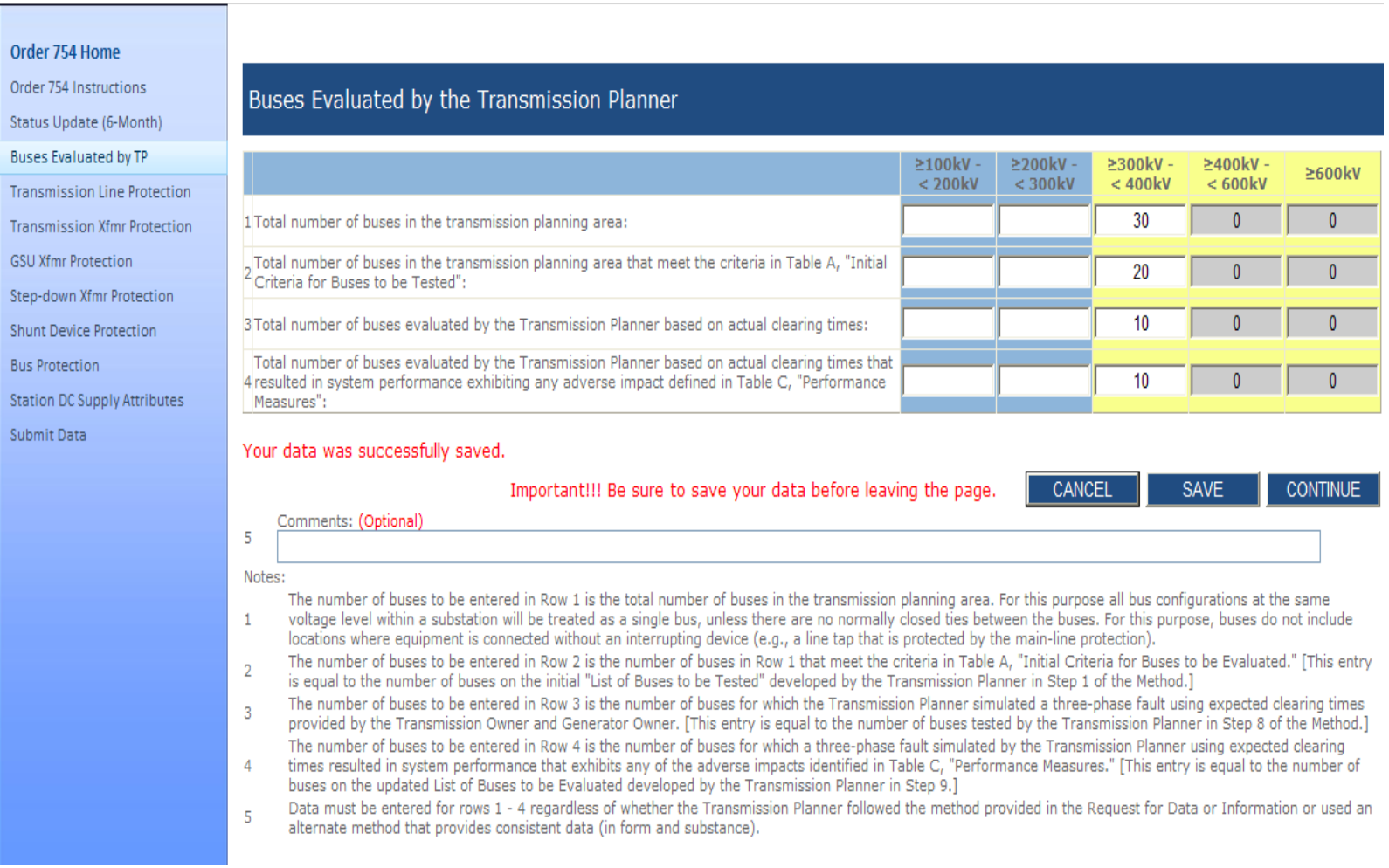


Data Rule –

The number entered in row #3 **must be equal to or less** than row #2

Such rules will be found in multiple tables to ensure data is valid and consistent.

Data Entry – Saving Data

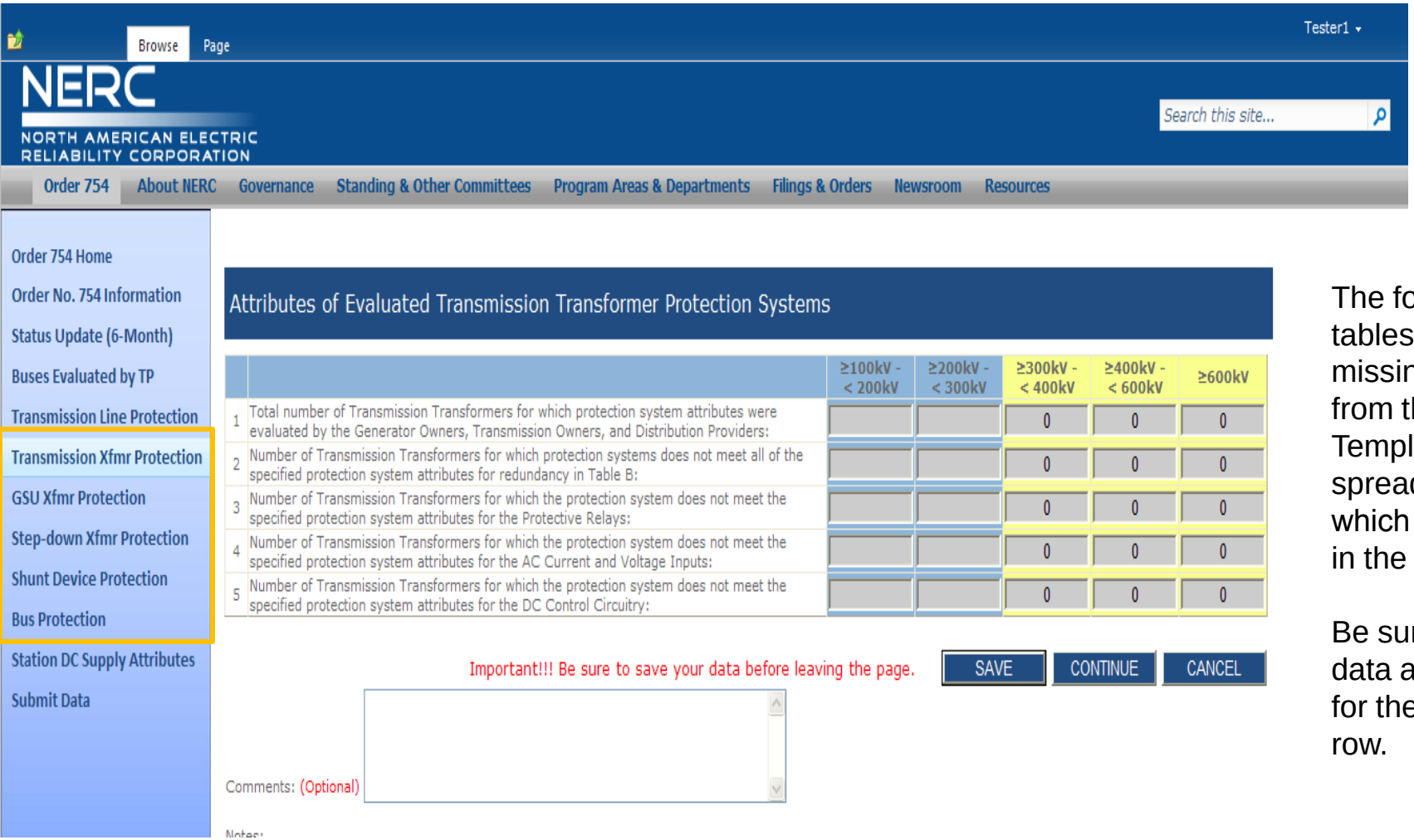


Users are encouraged to click **SAVE** before continuing.

Clicking CONTINUE **will save** the users data; however, the user might miss a data validation error or warning.

Clicking CONTINUE will automatically take the user to the next applicable table.

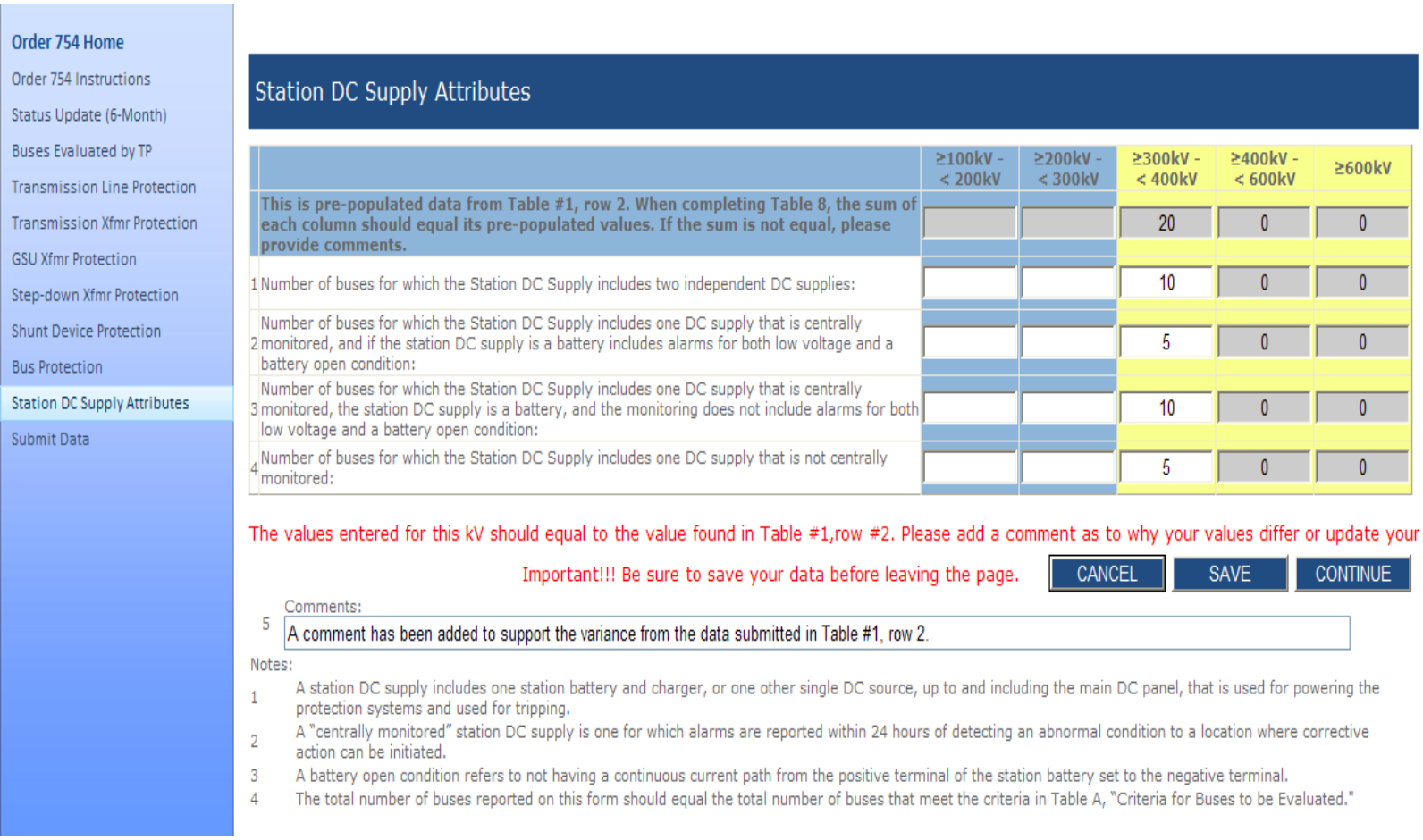
Data Entry – Missing Rows



The following tables are missing Row 4 from the Data Template spreadsheet which had “N/A” in the rows.

Be sure to enter data accounting for the missing row.

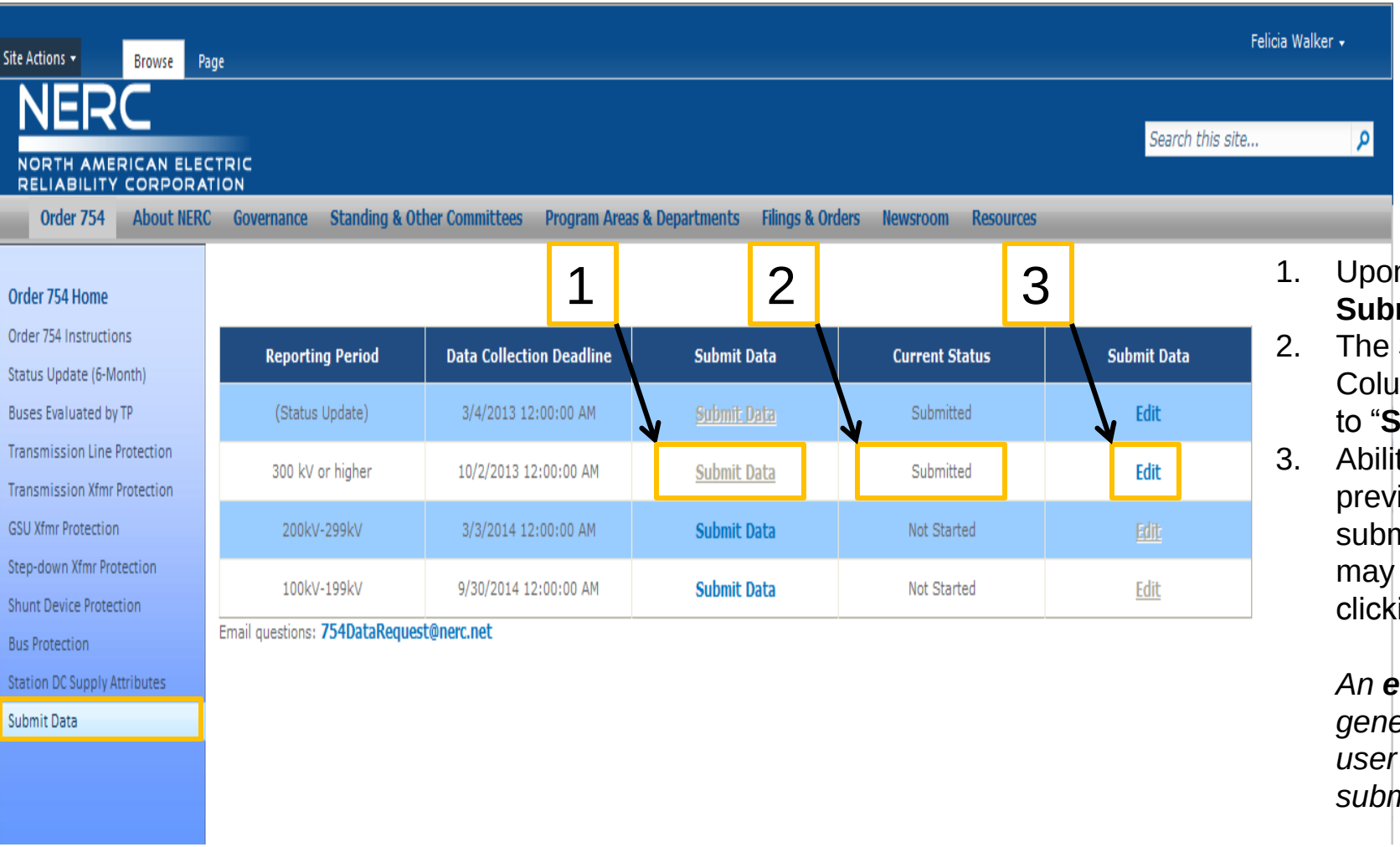
Station DC Supply – Rule



Station DC Supply Rule – The **sum** of the values entered in rows 1 – 4 should **equal** Row 2 from Buses Evaluated by TP. If not, the TP should provide an explanation.

Note that an exception explanation applies to each voltage column, but only in the single comment box.

Submitting Data

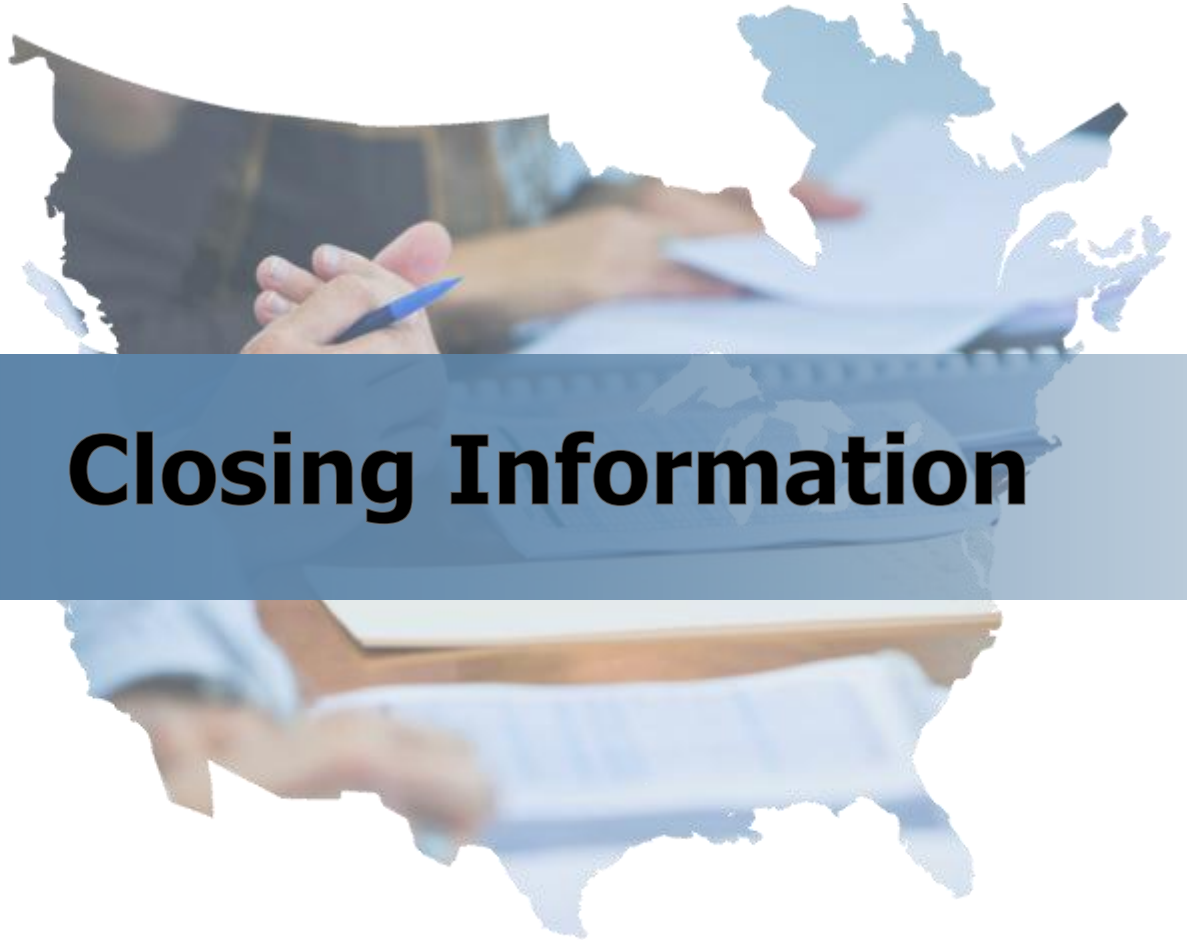


1. Upon clicking **Submit Data**
2. The Status Column updates to "**Submitted**"
3. Ability to edit previously submitted data may be done by clicking "**Edit**"

*An **email** is generated to the user confirming submission.*

Helpful Tips

- Portal is configured to recognize the person that originally acknowledged data request by their **email** provided (same email that notification was sent)
- **Use** the Order No. 754 project page as the portal entry path so not to miss important information
- Entities **may correct data** after submission – NERC staff will be notified of post deadline data changes
- Data must be submitted (i.e., to get confirmation)
- Data Request questions – DataRequest754@nerc.net
- Portal technical issues – see Technical Support slide



Closing Information

Project Update

- Reporting Period for buses 300 kV and higher
  - **Opens** Tuesday, September 3, 2013
  - **Closes** Wednesday, October 2, 2013 (Reminder will be sent)
- Voltages may be entered through each reporting deadline
- Future deadlines
  - Voltages greater than 200 kV and less than 300 kV
    - March 3, 2014
  - Voltages greater than 100 kV and less than 200 kV
    - September 30, 2014
- Reminder: Clarifications posted on project page

Finalizing Data Request

- Each entity is required to authorize its data submittal(s) to complete the data request
- See page 24 of the Data Request (August 16, 2012) for additional details and a template authorization
- Email Authorizations to: DataRequest754@nerc.net
  - Or deliver to:
    - NERC – Order No. 754
      C/O Scott Barfield-McGinnis, Standards Developer
      3353 Peachtree Rd, Suite 600, North Tower
      Atlanta, GA 30326

Technical Support

- Monday – Friday (except observed holidays)
  - 8:00 a.m.-5:00 p.m., Eastern
- To open an IT Help Desk ticket, email:
  - support@nerc.net
- Email must contain:
  - Requestor's name
  - Company name
  - Phone number
  - Region
  - Description of issue
  - Name of application (e.g., Order 754)

Questions and Answers