NITS on OASIS Adding Elements to Existing Service

**Business Owner:** Charles Cates

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# Revision History Chart

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**PROCESS OVERVIEW**

**Purpose**
This document defines the necessary steps required for a network transmission customer to create a new request for Network Integrated Transmission Service (NITS) using the NITS on OASIS templates. Timing requirements and required fields are outlined as well.

**Background**

**Requirements**
- Access to OASIS:

**Process Flowchart**

![Flowchart Diagram]

1. **Load** (add load)
2. **Owned Generation** (add owned generation)
3. **Purchased Generation** (add purchased generation)
4. **Add/Modify Load** (add load information)
5. **Add/Modify Generation** (add generation information)
6. **Add/Modify Resource** (add resource information)
7. **Add DNR** (designating the resource)
Process Flow (Status and Responsible Party)
The following sections will describe the process for adding new Load and designating new Resources to your existing NITS Application. You will need to know the “Application Ref” number in order to complete all of the following templates.

For all these examples, we will continue to use the NITS Application Ref # 2298 that was created in Section 2 of this document.
ADDITION NEW LOAD

You will need to know the “Application Ref” in order to complete this request template.

Section 3: Adding New Load to the NITS Application

2. In “Transactions” under NITS, select “Request Summary”

3. Select the New Request icon in the upper, right-hand corner of the gray band above the field headers
4. Select “Add/Modify Load”
5. Populate the Application fields:

5.1. “Select a Provider:”
   5.1.1. Select “SWPP” in this field

5.2. “Application Ref:”
   5.2.1. Enter your “Application Ref” here – for this example, we will use Application Ref # 2298

5.3. “Load Name *:”
   5.3.1. Select the to Enter the new Load Name (see red arrow above)
   5.3.2. The Load Name should include a description of the Point of Delivery and the Sink being added, for example:

5.3.3. Select “Submit”

6. Once you submit, the Load name will be populated in NITS Load Description section, and other items in the Application Fields are ready to be completed now:

![Image showing the application fields]

Figure 1: In this example, King Candy has created a Load Request for the Snickers City.

7. When all required fields are completed (highlighted in example above), select the Submit icon at the upper, right-hand side of the template

8. A “Save” window will open containing the “AddNITSLoad” Assignment Ref and the “Application Ref” it was added to.
Save

New Load with Assign Ref=70587753 has been added for Application Ref=2298.

OK
Section 3a: Required Fields for “Add/Modify Load”

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the load request
3. Load Name: A name that will describe the load being added to the NITS application. Once you enter the load name and submit, the Load name will be populated in NITS Load Description section, and other items in the Application Fields should be completed now.
4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state
5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly
6. Load Area: If within SPP footprint, use “SWPP,” otherwise, use the registered area in OASIS for the load
7. POD: The OASIS Point of Delivery for the request
8. Sink: The OASIS Sink for the Load request
9. Forecast Method: Use “ON_OASIS” to place forecast in OASIS, otherwise use “OFF_OASIS”
10. Effective Start Time: Must be submitted no later than 60 days in advance of queue date
11. Effective Stop Time: Cannot be less than 1 year after start date

Section 3b: Optional Fields for “Add/Modify Load”

1. Customer Comments: optional field for customer use
2. Load Description: optional field for Customer use.
3. Load Substation: optional field
4. Load Voltage: optional field

Section 3c: Do Not Change Fields for “Add/Modify Load”

1. Status Comments: Please do not populate this field
   1.1. This field will describe any errors encountered once the request has been submitted
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
4. Load Type: Use Default (FIXED) – do not change
ADDING OWNED GENERATION AS A NETWORK RESOURCE

Generation Details
You will need to know the “Application Ref” in order to complete this request template.

Section 4: Adding Generation Information for the Owned Network Resource

2. In “Transactions” under NITS, select “Request Summary”
3. Select the New Request icon in the upper, right-hand corner of the gray band above the field headers
4. Select “Add/Modify Generation”
5. Populate the Application fields:

5.1. “Select a Provider:”
   5.1.1. Select “SWPP” in this field

5.2. “Application Ref:”
   5.2.1. Enter your “Application Ref” here – for this example, we will use Application Ref # 2298

5.3. “Generation Name *:”
   5.3.1. Select the to Enter the new Generation Name (see red arrow above)
   5.3.2. The Generation Name should include Generator Name and Unit Number, for example:
   5.3.3. Select “Submit”

6. Once you submit, the Generator name will be populated in NITS Generation Description section, and other items in the Application Fields are ready to be completed now:
7. **Figure 2:** In this example, King Candy has created a Generation Request for Payday_1.

8. When all required fields are completed (highlighted in example above), select the Submit icon at the upper, right-hand side of the template.

9. A “Save” window will open containing the “AddNITSGeneration” Assignment Ref and the “Application Ref” it was added to.
Section 4a: Required Fields for “Add/Modify Generation”

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the generation request
3. Generation Name: A name that will describe the generation name and unit number being added to the NITS application, for example: Payday_1. Once you submit, the Generator name will be populated in NITS Generation Description section, and other items in the Application Fields are ready to be completed now:
4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state
5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly
6. Gen Group: For example, all Payday units will be under Payday
7. Gen Area: If within SPP footprint, use “SWPP,” otherwise, use the registered area in OASIS for the generation
8. Gen Location: City and State of unit
10. Gen Share: Percentage of ownership of the unit (for 100% enter 1, for 50% enter 0.5)
11. Gen Min Capacity: Greater than or equal to 0
12. Gen Max Capacity: Cannot be less than the “Gen Elig” Capacity
13. Gen Normal Capacity: Greater than or equal to 0
14. Gen Elig Capacity: Cannot be less than sum of the designated amounts
15. Gen Var Leading: Greater than or equal to 0
16. Gen Var Lagging: Greater than or equal to 0
17. Effective Start Time: Must be submitted no later than 24 hours in advance of queue date
18. Effective Stop Time: Cannot be less than 1 year after start date and must cover term of the intended designation

Section 4b: Optional Fields for “Add/Modify Generation”

1. Customer Comments: optional field for customer use
2. Generation Description: optional field for Customer use.

Section 4c: Do Not Change Fields for “Add/Modify Generation”

1. Status Comments: Please do not populate this field
   1.1. This field will describe any errors encountered once the request has been submitted
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
Resource Details

You will need to know the “Application Ref” in order to complete this request template.

Section 5: Adding Resource Information for the Owned Network Resource

2. In “Transactions” under NITS, select “Request Summary”
3. Select the New Request icon in the upper, right-hand corner of the gray band above the field headers
4. Select “Add/Modify Resource”
5. Populate the Application fields:

5.1. “Select a Provider:”
   5.1.1. Select “SWPP” in this field

5.2. “Application Ref:”
   5.2.1. Enter your “Application Ref” here – for this example, we will use Application Ref # 2298

5.3. “Resource Name *:”
   5.3.1. Select the * to Enter the new Resource Name (see red arrow above)
   5.3.2. The Resource Name will match the name you created for the Generator Details:

5.3.3. Select “Submit”

6. Once you submit, the Resource Name will be populated in NITS Resource Description section, and other items in the Application Fields are ready to be completed now:

7. Populate the Application fields:

Figure 3: In this example, King Candy has created a Resource Request for Payday_1.

8. When all required fields are completed (highlighted in example above), select the Submit icon at the upper, right-hand side of the template
9. A “Save” window will open containing the new Resource “Assignment Ref” and the “Application Ref” it was added to.
Section 5a: Required Fields for “Add/Modify Resource”

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the generation request
3. Resource Name: The Resource Name will match the name you created in the Generator Details section, when you submit, the Resource name will be populated in NITS Resource Description section, and other items in the Application Fields are ready to be completed now:
4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state
5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly
6. Resource Class:
   6.1. ON_SYSTEM: For a resource in SPP footprint
   6.2. OFF_SYSTEM: For a resource not in SPP footprint
7. Resource Type:
   7.1. GENERATION: For owned Generation
   7.2. EXECUTED_PPA: For purchased Generation
8. Forecast Method: Forecast is required, select “ON_OASIS”
9. Source Area:
   9.1. SWPP: For a resource in SPP footprint
   9.2. Area Name: For a resource not in SPO footprint
10. Title Area: Generally equal to Source Area

11. Effective Start Time: Must be submitted no later than 24 hours in advance of queue date
12. Effective Stop Time: Cannot be less than 1 year after start date and must cover term of the intended designation

Section 5b: Optional Fields for “Add/Modify Resource”

1. Customer Comments: optional field for customer use
2. Resource Description: optional field for customer use.

Section 5c: Do Not Change Fields for “Add/Modify Resource”

1. Status Comments: Please do not populate this field
   1.1. This field will describe any errors encountered once the request has been submitted
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
Designating the Owned Network Resource

You will need to know the “Application Ref” in order to complete this request template.

Section 6: Designating the New Resource

2. In “Transactions” under NITS, select “Request Summary”
3. Select “Add DNR” in Drop Down menu
4. Select Provider “SWPP”, Select Appropriate Application Ref and Select Appropriate Resource Name:
5. When all required fields are completed (highlighted in example above), select the Submit at the upper, right-hand side of the template

6. A “Save” window will open containing the new Application Ref (all service TSRs under a Service Agreement are associated with the same Application Ref) and the Assignment Ref (TSR number) related to the NewNITSApplication.

Figure 5: You will need the Application Ref for all other request templates related to this service (“Add/Modify Load,” “Add/Modify Generation,” “Add/Modify Resource” and “Add DNR”)
Section 6a: **Required Fields for “Add NITSDNR”**

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the generation request
3. Resource Name: selected from drop-down menu
4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field (see item 3 below)
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state
5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly
6. DNR Action: select “DESIGNATION”
7. POR: Point of Receipt
8. Source: Registered OASIS Source name
9. Attested: This field must be changed to “Yes”
10. Attestor Name: Should be a person with the authority sign the Attestation form
11. Attestation Submitter: Should be the user creating the Application in OASIS

**12. Start Date:** Cannot be in the past (no earlier than 6 months after start of Aggregate study)

**13. Stop Date:** Cannot be less than 1 year after start date
14. Gen Name: Must match the name you created in the Generator Details section
15. Capacity Requested: Amount of capacity to be studied for service

Section 6b: **Optional Fields for “Add NITSDNR”**

1. Customer Comments: Any notes the customer would like to add to the request
2. Filing Status: optional field

Section 6c: **Do Not Change Fields for “Add NITSDNR”**

1. Status Comments: Please do not populate this field
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
4. Customer Statement: Please do not modify this field
ADDING PURCHASED GENERATION AS A NETWORK RESOURCE

Resource Details
You will need to know the “Application Ref” in order to complete this request template.

Section 7: Adding Resource Information for the Purchased Network Resource
2. In “Transactions” under NITS, select “Request Summary”

3. Select the New Request icon in the upper, right-hand corner of the gray band above the field headers
4. Select “Add/Modify Resource”
4.1. Populate the Application fields:

4.2. “Select a Provider:”
   4.2.1. Select “SWPP” in this field

4.3. “Application Ref:”
   4.3.1. Enter your “Application Ref” here – for this example, we will use Application Ref # 2298

4.4. “Resource Name *:”
   4.4.1. Select the * to Enter the new Resource Name (see red arrow above)
   4.4.2. The Resource Name should reflect the Generator Name and Unit number, for example:

4.4.3. Select “Submit”

5. Once you submit, the Resource name will be populated in NITS Resource Description section, and other items in the Application Fields are ready to be completed now:
Figure 6: In this example, King Candy has created a Resource Request for Butterfinger_1.

6. When all required fields are completed (highlighted in example above), select the Submit icon at the upper, right-hand side of the template

7. A “Save” window will open containing the “AddNITSResource” Assignment Ref and the “Application Ref” it was added to.
Section 7a: Required Fields for “Add/Modify Resource”

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the generation request
3. Resource Name: A name that will describe the generation name and unit number being added to the NITS application, for example: Butterfinger_1. Once you submit, the Resource name will be populated in NITS Resource Description section, and other items in the Application Fields are ready to be completed now:

4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state

5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly

6. Resource Class:
   6.1. ON_SYSTEM: For a resource in SPP footprint
   6.2. OFF_SYSTEM: For a resource not in SPP footprint

7. Resource Type:
   7.1. GENERATION: For owned Generation
   7.2. EXECUTED_PPA: For purchased Generation

8. Forecast Method: Forecast is required, select “ON_OASIS”

9. Source Area:
   9.1. SWPP: For a resource in SPP footprint
   9.2. Area Name: For a resource not in SPP footprint

10. Title Area: Generally equal to Source Area

11. Effective Start Time: Must be submitted no later than 24 hours in advance of queue date

12. Effective Stop Time: Cannot be less than 1 year after start date and must cover term of the intended designation

Section 7b: Optional Fields for “Add/Modify Resource”

1. Customer Comments: optional field for customer use
2. Resource Description: optional field for customer use.

Section 7c: Do Not Change Fields for “Add/Modify Resource”

1. Status Comments: Please do not populate this field
   1.1. This field will describe any errors encountered once the request has been submitted
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
Designating the Purchased Network Resource

You will need to know the “Application Ref” in order to complete this request template.

Section 8: Designating the New Resource

2. In “Transactions” under NITS, select “Request Summary”
3. Select “Add DNR” in Drop Down menu
4. Select Provider “SWPP”, Select Appropriate Application Ref and Select Appropriate Resource Name:
5. When all required fields are completed (highlighted in example above), select the Submit button at the upper, right-hand side of the template.

6. A “Save” window will open containing the new Application Ref (all service TSRs under a Service Agreement are associated with the same Application Ref) and the Assignment Ref (TSR number) related to the NewNITSApplication.

7. You will need the Application Ref for all other request templates related to this service (“Add/Modify Load,” “Add/Modify Generation,” “Add/Modify Resource” and “Add DNR”)
Section 8a: **Required** Fields for “Add NITSDNR”

1. Provider: For SPP customers, this field will be “SWPP”
2. Application Ref: The Application Ref # associated with the generation request
3. Resource Name: selected from drop-down menu
4. Status:
   4.1. Queued: If this option is selected, once you hit submit, the application will go into a queued state and if everything is completed correctly will automatically go to either an “Accepted” state or to a “Confirmed” state depending on your selection in the “Preconfirmed” field (see item 3 below)
   4.2. Presubmitted: If this option is selected, when you hit submit, the application will be saved and the customer can continue working on it until it is ready to be submitted in a “Queued” state
5. Preconfirmed:
   5.1. No: Customer will need to “confirm” request once it has been accepted
   5.2. Yes: Request will automatically go into a “Confirmed” state if everything is completed correctly
6. DNR Action: select “DESIGNATION”
7. POR: Point of Receipt
8. Source: Registered OASIS Source name
9. Attested: This field must be changed to “Yes”
10. Attestor Name: Should be a person with the authority sign the Attestation form
11. Attestation Submitter: Should be the user creating the Application in OASIS
12. **Start Date:** Cannot be in the past (no earlier than 6 months after start of Aggregate study)
13. **Stop Date:** Cannot be less than 1 year after start date
14. Gen Name: Must match the name you created in the Generator Details section
15. Capacity Requested: Amount of capacity to be studied for service

Section 8b: **Optional** Fields for “Add NITSDNR”

1. Customer Comments: Any notes the customer would like to add to the request
2. Filing Status: optional field

Section 8c: **Do Not Change** Fields for “Add NITSDNR”

1. Status Comments: Please do not populate this field
2. Provider Comments: Please do not populate this field
3. Seller Comments: Please do not populate this field
4. Customer Statement: Please do not modify this field
VIEW NITS APPLICATION SUMMARY

To view all service details for Load, Generation Details and Resource Details associated with a NITS application, please use the following steps:

Please note: Requests in the following States will be available in the summary view:
1. Confirmed
2. Completed
3. Study
4. Deficient

Application Summary

2. In “Transactions” under NITS, select “Application Summary”

3. Select the Server Filter Options icon in the upper, right-hand corner of the gray band above the field headers

4. Using the “Customer” field and changing the “Time” to “Update” and “All” will be the easiest way to find the NITS Application you are looking for.
5. Add filters and select “Apply”

6. For this example, we will use Application Ref: 2298 since we built it in the prior examples.

7. Select 2298 in the “Application Ref” column

8. The “NITS Application Detail” window will open displaying a summary of the Load, Generation Detail and Resource Details associated with the NITS Application.
VIEW DESIGNATED NETWORK RESOURCES (DNRS) SUMMARY

To view all DNRs associated with a NITS application, please use the following steps:

Please note: Only requests in the “Confirmed” State will be available in this summary view.

For this example, we will continue to use Application Ref 2298.

DNR Summary

2. In “Transactions” under NITS, select “DNR List”

3. Select the Server Filter Options icon in the upper, right-hand corner of the gray band above the field headers

4. Use the “Appl Ref” field and change the “Time” to “Active” and “Today Forward” and all “Confirmed” Designations will populate that are associated with the NITS Application.
5. Add filters and select “Apply”
6. A high-level summary of all designations associated with Application Ref 2298 is now available.
DEFCIENT REQUESTS

If a field is incorrectly populated when submitting a request in any of the NITS on OASIS templates, it will come back in a “Deficient” state.

Some items that will cause a template to fail are:

1. Timing requirements have not been met
2. Attestation was not completed for:
   a. NITS Application
   b. DNR Request
3. DNR Designated Capacity amount > Generation Eligible Amount

If your request comes back “Deficient” please review the “Required Fields” section associated with the “Deficient” request.

To correct the error(s), the request can be edited and then submitted for “Re-Evaluation” by using the following steps:

Correcting a Deficient Request

2. In “Transactions” under NITS, select “Request Summary”

3. Select the Server Filter Options icon in the upper, right-hand corner of the gray band above the field headers
4. Enter the Appl Ref associated with the Deficient request

5. Select “Apply”

6. Select the deficient request in the “Assign Ref” column

7. The above request is deficient for 2 reasons:
   7.1. Effective Start Time is in the past
   7.2. No resource forecast was included with the request

8. To correct the errors, select the Edit icon at the upper, right-hand side of the template
   8.1. Update the “Effective Start Time” to be 24 hours after the queue time of the request
   8.2. Add the Summer and Winter forecasts
      8.2.1. Make sure the Start and Stop time are updated to reflect the span of the forecast being submitted
9. Once these updates have been made, select the Submit icon at the upper, right-hand side of the template.

10. Next, select the ReEvaluate icon at the upper, right-hand side of the template.

11. The OASIS system will revalidate the request and if there are no errors, it will move the request into one of the following states depending on the request type:

   11.1. Study State:
       11.1.1. Add DNR
       11.1.2. Add/Modify Load

   11.2. Accepted State:
       11.2.1. New Application
       11.2.2. Add/Modify Generation
       11.2.3. Add/Modify Resource