



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

1. RECOMMENDED ACTION:

- Accept as requested
- Accept as modified below
- Decline

EFFECT OF EC VOTE TO ACCEPT RECOMMENDED ACTION:

- Change to Existing Practice
- Status Quo

2. TYPE OF MAINTENANCE

Per Request:

- Initiation
- Modification
- Interpretation
- Withdrawal

- Principle (x.1.z)
- Definition (x.2.z)
- Business Practice Standard (x.3.z)
- Document (x.4.z)
- Data Element (x.4.z)
- Code Value (x.4.z)
- X12 Implementation Guide
- Business Process Documentation

Per Recommendation:

- Initiation
- Modification
- Interpretation
- Withdrawal

- Principle (x.1.z)
- Definition (x.2.z)
- Business Practice Standard (x.3.z)
- Document (x.4.z)
- Data Element (x.4.z)
- Code Value (x.4.z)
- X12 Implementation Guide
- Business Process Documentation

3. RECOMMENDATION

SUMMARY:

Modify the following NAESB WGQ Definitions:

4.2.1

Modify the following NAESB WGQ Standards:

4.3.16, 4.3.18, 4.3.22, 4.3.23, 4.3.25

Delete the following NAESB WGQ Principles:

4.1.25

Delete the following NAESB WGQ Standards:

4.3.6, 4.3.19, 4.3.21, 4.3.63

Add the following NAESB WGQ Proposed Principle:

0.1.z1

Modify the following NAESB WGQ Interpretation:

7.3.35

Modify the WGQ Electronic Delivery Mechanism (EDM) Related Standards book business documentation.



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

STANDARDS LANGUAGE:

Proposed Deleted Principle:

~~4.1.25 Additional Informational Postings under NAESB WGQ Standard No. 4.3.6 which are not yet standardized for Web sites should be communicated over the Internet via a "common look and feel" standardized Web page.~~

Proposed Modified Definition:

4.2.1 "Informational Postings" is the term that identifies common information as specified in WGQ Standard 4.3.23, ~~which would include the five required postings under NAESB WGQ Standard 4.3.6.~~

Proposed Deleted Standard:

~~4.3.6 Transportation Service Providers should establish a HTML page(s) accessible via the Internet. The information should be posted:~~

- ~~1) Notices (critical notices, operation notices, system wide notices, etc.)~~
- ~~2) FERC Order No 566 affiliated marketer information. (affiliate allocation log, 24 hr. discount posting, etc.)~~
- ~~3) Operationally available and unsubscribed capacity~~
- ~~4) Index of customers~~
- ~~5) Transportation Service Provider's tariff (Terms, conditions and rates), or general terms and conditions.~~

Proposed Modified Standard:

4.3.16 ~~The documents identified in NAESB WGQ Standard 4.3.6 should be made available in HTML or RTF format, except with respect to~~ On the Informational Postings Web site, the The Index of Customers document which may be displayed in HTML or RTF format or in other formats that comply with the Browser Capabilities as specified in Appendix D of the NAESB WGQ Electronic Delivery Mechanism Related Standards. ~~and which It should also be downloadable in a defined, tab-delimited ASCII text file, with provisions for title information and footnote capability, as set forth in Code of Federal Regulations Part 284, Section 223. (Reference Order Number 637, Docket No. RM98-10-000, issued February 9, 2000, "Appendix A, Instruction Manual for Electronic Filing of the Index of Customers" issued pursuant to the above referenced order.)~~

Proposed Modified Standard:

4.3.18 Transportation Service Providers should provide and keep current to the Central Address Repository the addresses (URLs) for the Informational Postings Web site ~~following in a specified format and communication method(s):~~

- ~~Informational Postings~~
- ~~Affiliated Marketer Info.~~
- ~~Capacity~~
- ~~Index of Customers~~
- ~~Notices~~
- ~~Tariff~~
- ~~Downloads~~
- ~~Site Map~~



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

This specification and any changes to it should be subject to NAESB-WGQ approval.

Proposed Deleted Standard:

4.3.19 The Central Address Repository should make available a consolidated repository of the Transportation Service Providers' current URL listed in NAESB-WGQ Standard 4.3.18 in two ways: 1) a vehicle to link to sites and categories, and 2) a downloadable list.

Proposed Deleted Standard:

4.3.21 The categories and the labels for Informational Postings required under NAESB-WGQ Standard 4.3.6 should be as follows:

- ~~Affiliated Marketer Info.~~
- ~~Capacity~~
- ~~Index of Customers~~
- ~~Notices~~
- ~~Tariff~~

Proposed Modified Standard:

4.3.22 On the Informational Postings Web site, the following navigational links should appear last in the Navigational Area and be labeled as follows:

- Downloads
- Search
- Customer Activities
- Site Map

Proposed Modified Standard:

4.3.23 Transportation Service Providers should establish an Informational Postings Web site accessible via the Internet. The subcategories and labels for the categories of Informational Postings should be as follows:

CATEGORIES

~~Affiliated Marketer Info.~~

Capacity

Energy Affiliate Info

Index of Customers

Non-discrimination Rqts

Notices

SUBCATEGORIES

~~Capacity Allocation Log (when applicable)~~

~~Discount Offers~~

Operationally Available

Unsubscribed

Capacity Allocation Log (when applicable)

Employee Transfers

Names and Addresses

Potential Mergers

Shared Facilities

Discounts

Emergency Deviations

Implementation Procedures

Information Disclosure

Tariff Discretionary Actions

Critical

Non-Critical



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

| | |
|-------------------------|------------------------------|
| Organizational Charts | Planned Service Outage |
| Posted Imbalances | Title Page |
| Tariff | Table of Contents |
| | Preliminary Statement |
| | Map |
| | Currently Effective Rates |
| | Rate Schedules |
| | General Terms and Conditions |
| | Form of Service Agreement |
| | Entire Tariff |
| | Sheet Index |
| Transactional Reporting | |

These categories and labels should appear in the order specified above and before any others.

Proposed Modified Standard:

4.3.25 The Site Map should be provided in the Content Area and should include links to all levels of categories described in ~~NAESB WGQ Standard 4.3.21~~ and NAESB WGQ Standard 4.3.23. Each level of category and subcategory should be indented to show its relationship and should be presented in text form to best utilize space.

Proposed Deleted Standard:

~~4.3.63 In the Navigational Area of the Informational Postings Web Site, the navigational link for "Customer Activities" should appear directly above the navigational link for "Site Map".~~

Proposed Principle:

0.1.z1 A Transportation Service Provider as used in the NAESB WGQ standards is not necessarily the same as a Transmission Provider as defined in Title 18 of the Code of Federal Regulations.

INTERPRETATIONS LANGUAGE:

Proposed Modified Interpretation:

7.3.35 According to NAESB WGQ Standard ~~4.3.6~~ 4.3.23, notices are now supposed to be posted on the Transportation Service Providers' (TSP) Web pages. Does this mean that a TSP is not required to provide any alternative form of communication for notices such as telephone or fax, particularly for those notices issued outside of business hours and on weekends?

According to NAESB WGQ Standard ~~4.3.6~~ 4.3.23, notices (~~critical notices, operation notices, system wide notices, etc.~~) are supposed to be posted on the Transportation Service Providers' (TSP) Web pages. Does this mean that a TSP is not required to provide any alternative form of communication for these specified notices?



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

Interpretation:

NAESB WGQ Standard ~~4.3.6~~4.3.23 does not specify any alternative means of notification aside from the Web page nor does it specify that the only means of notification is by means of the Web page. Alternative means of notification for particular information may be required by regulation, tariff or other NAESB WGQ standards. For example notices pertaining to system wide events of both a critical and non-critical nature (NAESB WGQ Standard 5.3.18) are implemented via both downloads (NAESB WGQ Standard 5.4.16) and the Web pages (NAESB WGQ Standard ~~4.3.6~~4.3.23).

BUSINESS PROCESS DOCUMENTATION (for addition, modification or deletion of business process documentation language)

Standards Book:

Modify Tab 7 of the NAESB WGQ EDM Manual - Technical Implementation - Informational Postings Web Site (IP/EDM) as follows:

| |
|--|
| <p>Language:</p> <p>Introduction</p> <p>Industry Goal/Purpose</p> <p>The goal of Informational Postings/EDM, like EBB/EDM, is indicated by <u>reflected in</u> NAESB WGQ Standard 4.3.6<u>23</u>.</p> <p>4.3.6 — Transportation Service Providers should establish a HTML page(s) accessible via the Internet. The following information should be posted:</p> <ol style="list-style-type: none"> 1) Notices (critical notices, operation notices, system wide notices, etc.) 2) FERC Order No 566 affiliated marketer information. (affiliate allocation log, 24 hr. discount posting, etc.) 3) Operationally available and unsubscribed capacity 4) Index of customers 5) Transportation Service Provider's tariff (Terms, conditions and rates), or general terms and conditions. <p>The scope of the standards and guidelines for the Informational Postings Web site is pertaining to the Web site implemented on behalf of the transportation service provider in providing public information identified in NAESB WGQ Standard 4.3.6<u>23</u>, for viewing and downloading. As a further development of the objectives pertaining to Informational Postings/EDM, the standards and guidelines were required to provide common accessibility of the Web site and information contained therein (common "look and feel"). While the standards do not attempt to dictate back office system technology or exact placement of data elements within the Informational Postings Web site, overall layout is addressed in addition to determining common terminology used to identify the links for navigation and their order of placement. Guidelines were also developed pertaining to minimum client configuration for which the transportation service provider's Web site would be designed. The users of such sites could expect to follow the guidelines to access information on the sites (see Appendix "C"). Search capabilities desired for the tariff were expressed in the standards.</p> |
|--|



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

Modify Tab 8 of the NAESB WGQ EDM Manual - Technical Implementation - EBB/EDM as follows:

Language:

Introduction

Industry Goal/Purpose

The goal of EBB/EDM ~~can be found~~ is reflected in NAESB WGQ Standard 4.3.642, ~~which reads:~~

~~Transportation Service Providers should establish a HTML page(s) accessible via the Internet. The following information should be posted:~~

- ~~1) Notices (critical notices, operation notices, system wide notices, etc.)~~
- ~~2) FERC Order No 566 affiliated marketer information. (affiliate allocation log, 24 hr. discount posting, etc.)~~
- ~~3) Operationally available and unsubscribed capacity~~
- ~~4) Index of customers~~
- ~~5) Transportation Service Provider's tariff (Terms, conditions and rates), or general terms and conditions.~~

TECHNICAL CHANGE LOG (all instructions to accomplish the recommendation)

No technical changes are needed.

4. SUPPORTING DOCUMENTATION

a. Description of Request:

b. Description of Recommendation:

Business Practices Subcommittee

See the Business Practices Subcommittee (BPS) meeting minutes, attachments, and transcripts for the supporting documentation, discussion, and voting records for the following dates:

1/08/2004
1/22/2004
2/05/2004
2/19/2004
3/04/2004
3/11/2004

Interpretations Subcommittee

See the minutes from the Interpretations Subcommittees conference call on March 11, 2004.

Information Requirements Subcommittee

See the minutes from the joint EDM/IR/Technical Subcommittees conference call on March 16, 2004.



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

2004 AP #2 FERC Order 2004 (Affiliate Order)

As Revised by the WGQ EC on May 6, 2004

Technical Subcommittee

See the minutes from the joint EDM/IR/Technical Subcommittees conference call on March 16, 2004.

EDM Subcommittee

See the minutes from the joint EDM/IR/Technical Subcommittees conference call on March 16, 2004.

c. Business Purpose:

To implement the FERC Order 2004 (Standards of Conduct order).

d. Commentary/Rationale of Subcommittee(s)/Task Force(s):