FERC Tariff System Software Installation Manual

Overview of FERC Tariff System Installation

The steps in performing an initial installation and setup of FERC Tariff System Software are as follows:

1. Downloading the FERC Tariff System Software
2. Installing the FERC Tariff System
3. Starting The FERC Tariff System and Performing Internet Setup
4. Designating Tariff Database Location
5. Downloading Company Data.

Additional topics of interest include the following:

- Using an Existing Tariff Database
- Troubleshooting FERC Tariff Software Installation And Setup.
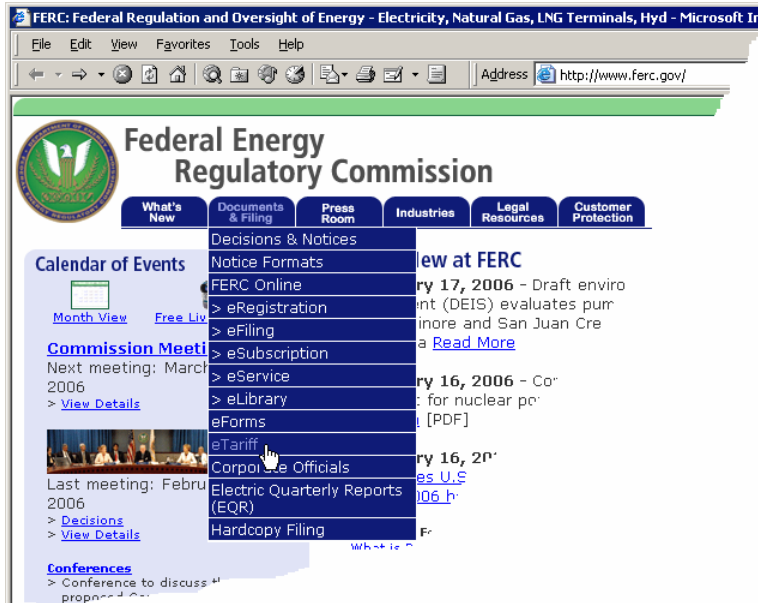
Installation And Setup Notes

- Hardware and software requirements:

    o Minimum of Pentium processor, 256 RAM, 50 megs free space on a hard drive (depending on the size of the tariff data base), 800x600 resolution monitor.

    o Internet connection with both HTTP and FTP protocols.

    o Microsoft Windows 98, 2000 or XP.

- Download the installation file for the FERC Tariff System software from the FERC web server (at location http://www.ferc.gov/docs-filing/etariff.asp).

- The installation file allows you to install the application on a PC workstation.

- The FERC Tariff System's software must be installed on a PC workstation – It will not run if installed on a network drive.

- Proper installation and set up of the FERC Tariff System requires administrative permissions for the workstation. If you encounter problems related to internet communications or access permissions, contact your network or IT Support personnel. You can acquire the proper internet settings for the FERC Tariff system by checking the internet settings used for other FERC eForms applications currently being used at your site.

- After installation, the installation file is no longer needed and should be deleted as it may become dated.

- Once the software is installed, the FERC Applications program group and FERC Tariff System icon will be placed in your workstation's "Start Menu".

- To download a company tariff database, you will need the Company ID (CID) provided to you by FERC [During beta testing, CIDs may or may not be required].

- If you desire having multiple users working with tariff data, the database must be located on a shared network drive accessible by all users.

- Access permissions on your workstation: During normal FERC Tariff System operation, the user will require complete (full) access rights to (1) the folder where the program is installed and (2) the database folder.

- Using an Existing Database: If you are reinstalling the software and already have a tariff database on your system, the existing tariff database should be used instead of attempting to download a new database. See "Using an Existing Tariff Database".

- Internet Setup Options HTTP and FTP Settings: In most cases, you will not need to change the HTTP and FTP settings displayed on the Internet Setup Options window. If you do need to change the values in these field, obtained them from your network or IT Support personnel. You can also access the screen used to set these options from within the FERC Tariff system by selecting the **FERC Communications Setup** item from the main window's **Options** menu. **<u>Note</u>:** FERC Communications Setup changes will not take effect until you exit the FERC Tariff system and restart then it.

- Each time the FERC Tariff software is started on a specific workstation, the startup processing will communicate with the FERC Forms Server using an internet connection to determine the availability of updated system components. If updates are available, they are downloaded and installed to the workstation automatically. In addition to ensuring dissemination of the latest program components, this communication method allows system problems to be repaired and facilitates tariff data reporting and synchronization.

- The software version number is displayed in the top left-hand corner of the FERC Tariff System Start-up screen. The version number value identifies the release version of the FERC Tariff System software. FERC Tariff System software updates are automatically downloaded to the workstation each time a user starts the system.

- If you have problems getting the software to present a list of companies to download, or difficulty obtaining software updates from the FERC Server, you may screen print the Internet Setup Options dialog box for reference during troubleshooting with your Network/IT Support Personnel.

- The term "eTariff Submission Software" refers to the FERC Tariff System.

- These installation instructions will be updated as needed.

Downloading the FERC Tariff System Software

Use the following procedure to download the FERC Tariff System software:

1. To locate the FERC Tariff System software installation file (etariffinst.exe), point your browser to the FERC.GOV web site and then select **eTariff** from the **Documents & Filing** menu.
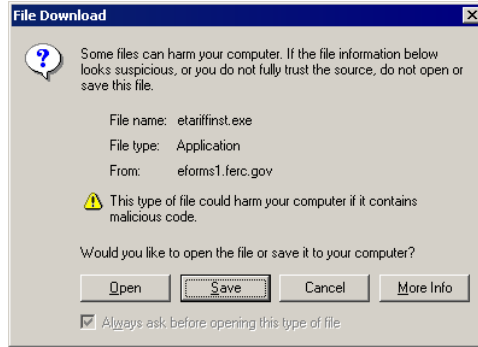

FERC.GOV Documents & Filing Menu and eTariff Menu Item.

The system displays **Documents & Filing: eTariff** web page.

2. Click the Download Software link to obtain the FERC Tariff System software installation file. This is illustrated below.

Download Software link on eTariff web page.

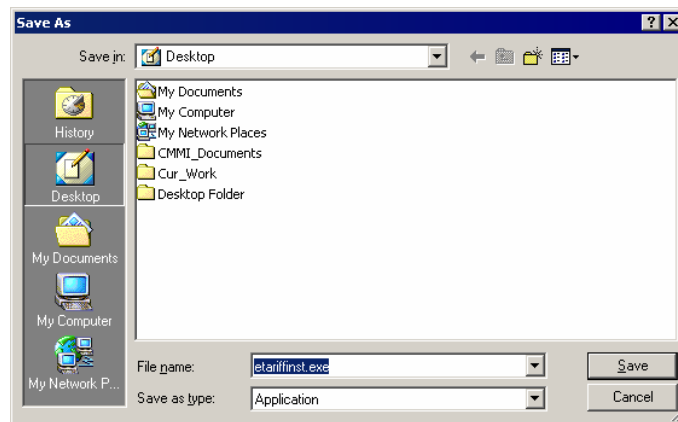The system displays the File Download dialog box.

File Download dialog box.

3. At this point, you can either (a) Click the **Open** button to download the file and begin the installation on your workstation *OR* (b) Click the **Save** button to download the installation file to a location that you designate, such as a network drive or your workstation's hard drive - You must then open the installation file in a separate step.

   <u>**Note - Administrators:**</u> Open the installation file as a separate step if you will be installing the FERC Tariff System software on multiple workstations: You can copy the installation file to one of your network drives and then open it from each workstation on which the software is to be installed.

4. If you clicked the **Save** button, the system displays the Save As dialog box: Save the installation file to a preferred location.
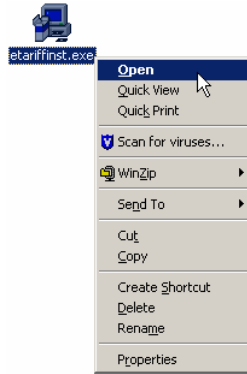

Save As dialog box.

Installing the FERC Tariff System

Use the following procedure to install the FERC Tariff System software (**Note:** The first steps of this procedure may not apply to your installation scenario if you chose to Open the installation file during downloading):
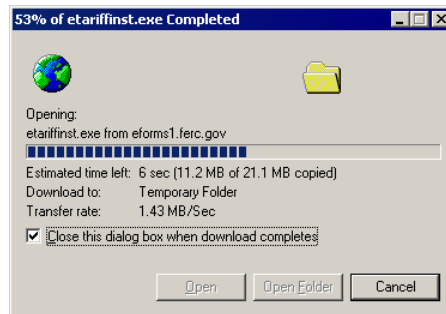
1. To install the FERC Tariff System software from a saved installation file, use Window Explorer to locate the file and then open it to begin the installation process (Open the file by either double-clicking the file name/icon or by right-clicking the file name/icon and selecting the **Open** item from the displayed right-click menu, as illustrated below).

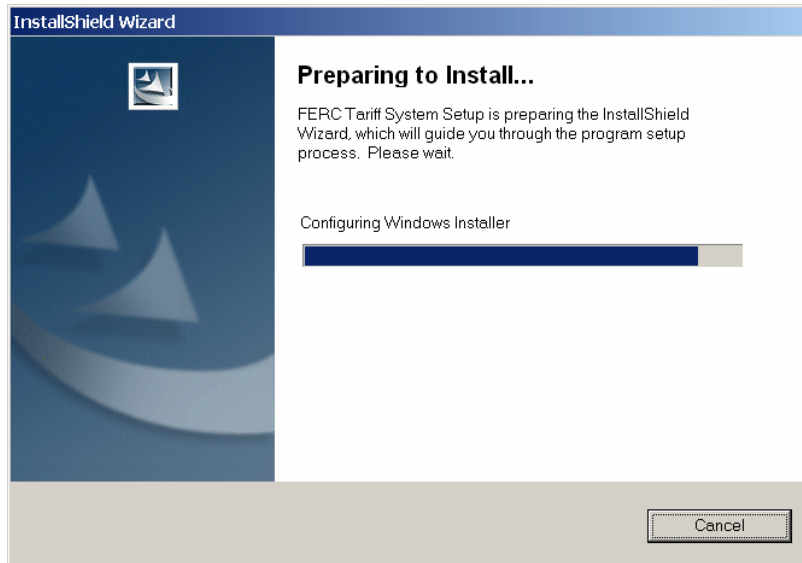*FERC Tariff System installation file icon with right-click menu displayed.*

Once the FERC Tariff System installation file is opened, the system briefly displays an Opening status message box. The system then starts the installation program.

Note: If your system will not allow the installation file to be downloaded or opened, check with your system administrator or IT Support staff to ensure that your system's permissions allow proper FERC Tariff System installation and operation.
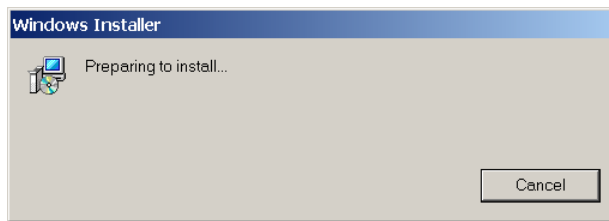

Opening status message box.

The FERC Tariff System installation program uses the InstallShield Wizard to automate the process of installing the FERC Tariff System: Since this is a Windows environment, the system briefly displays two message boxes indicating the system is working with Windows to prepare the installation, as illustrated below:

Preparing to Install screen.

The Window Installer is briefly displayed during the beginning of installation.

2. When the system displays the Welcome dialog box, click the **Next >** button to proceed with FERC Tariff Software installation.

Welcome screen.

Note: Although displayed as an inactive button on the Welcome dialog box, the **Back** button is displayed throughout the series of InstallShield Wizard screens to allow you to return to a previous step of the installation.
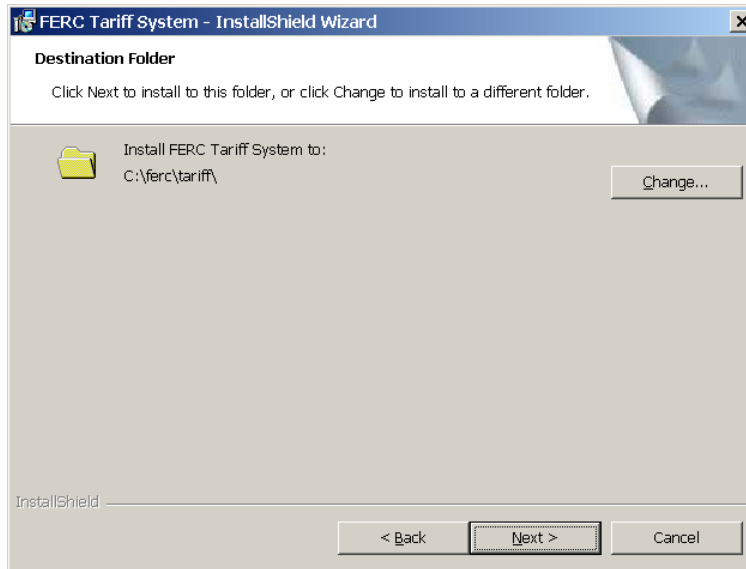
The system displays the Customer Information InstallShield screen.

Customer Information InstallShield screen.

3. Enter your name within the **User Name** field.

    Note - Administrator: Administrators should enter the name of the person who will be using the system.

4. Enter your company's name within the **Organization** field.

5. By default, the installer sets the selection for the "**Install this application for:**" radio buttons to "**Anyone who uses this computer (all users)**". Retain this value by leaving these controls alone.

6. Click the **Next** button to continue with the installation. The system displays the Destination Folder screen.
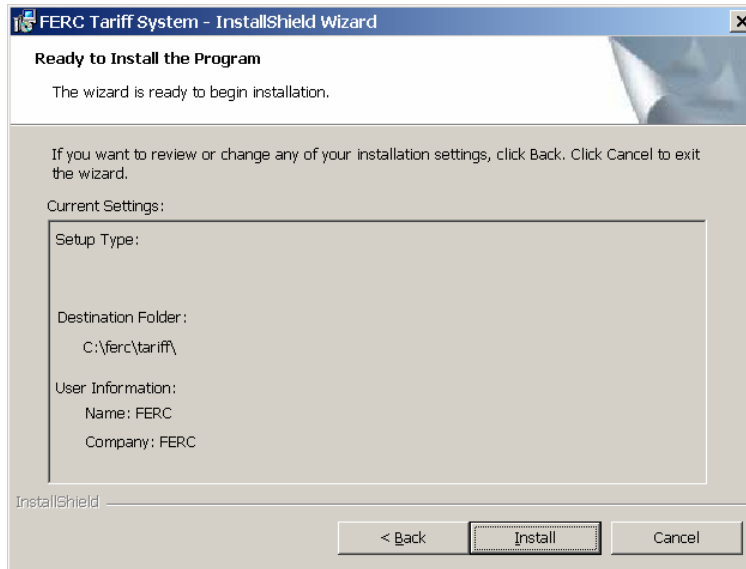
Destination Folder screen.

This dialog box displays the directory path of the folder to which the FERC Tariff System will be installed. This will become the FERC Tariff System's program folder. Please do not change the **Install to** folder name or location.
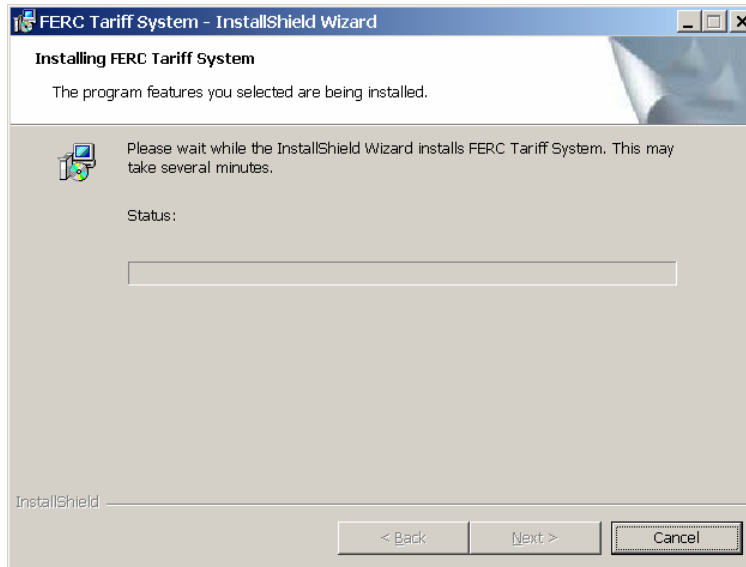
Important Notes:

- The FERC Tariff System's software must be installed on a PC workstation – It will not run if installed on a network drive.

- The **Change** button supports changing the **Destination Folder** value and can be used to place the program in another location (such as a company-standard location).

- Wherever the program is installed, the user must have complete (full) access rights (permissions to read, write, delete, modify, and create subfolders).

7. Click the **Next** button to proceed with the installation. The system then displays the Ready to Install screen.
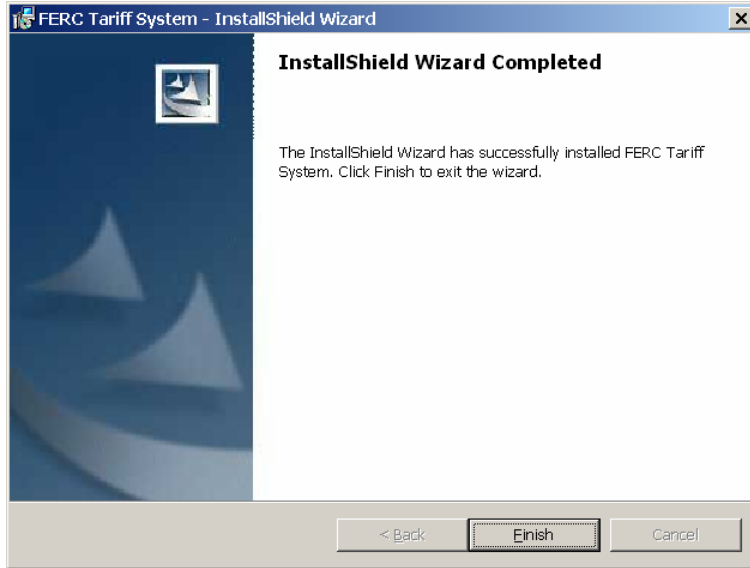
Ready to Install screen.

8. Confirm that the displayed installation setting are correct and proceed with the installation by clicking the **Install** button. The system displays the Installing FERC Tariff System screen which reflects the status of the installation process.

Installing FERC Tariff System screen.

When the installation is completed, the system displays the InstallShield Wizard Complete screen.

InstallShield Wizard Complete screen.

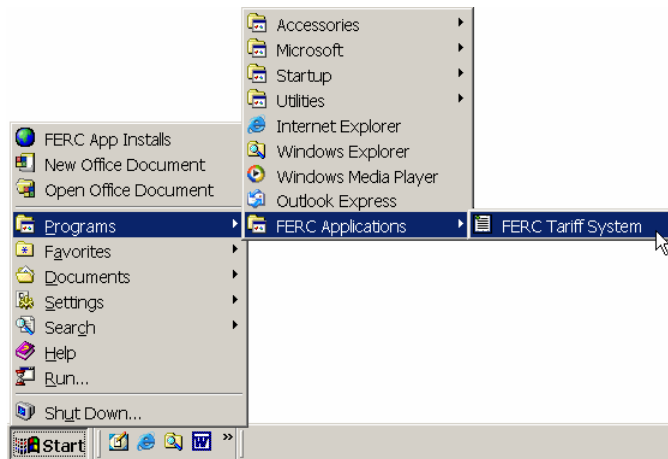9. Click the **Finish** button to complete installation.

   At this point, the installation is complete and the FERC Tariff System can now be initially run from the system's **Start** menu. After starting the system, the Startup screen can be used to access company tariff data download commands and internet setup options.

   Next, set your internet setup options and obtain the initial company tariff database download.

Starting The FERC Tariff System

To Start the FERC Tariff System:

1. Click the Windows Start Menu and then select the **Programs** | **FERC Applications** | **FERC Tariff System** menu item.
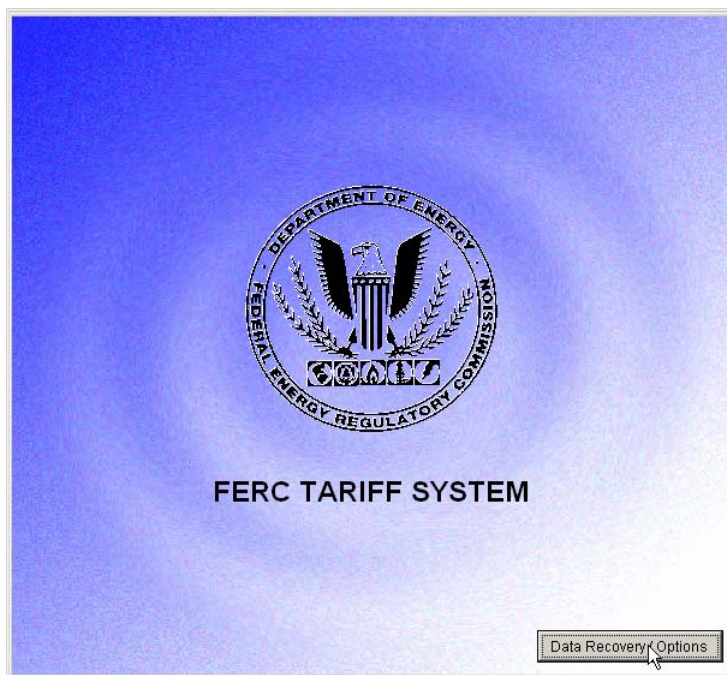

Windows' Start Menu with FERC Applications program group and FERC Tariff System menu item.

   The system displays the FERC Tariff System Start-up screen. In addition to providing information about system identification and startup status, the screen displays the **Data Recovery**

/ Options button which provides access to company tariff data download commands and internet setup options.

If you are running the FERC Tariff system for the first time, at startup the system detects that it has no database to work with and automatically displays the ETariff Data Download dialog box.

If the system has been set up previously, the FERC Tariff System Start-up screen is displayed and the system proceeds with standard system startup.
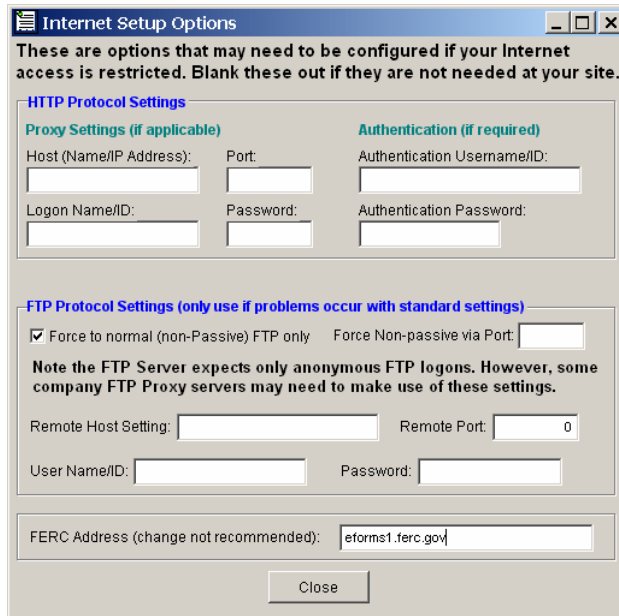

FERC Tariff System Start-up screen with Data Recovery / Options button.

Performing Internet Setup

If the system has been set up previously, the **Data Recovery / Options** button displayed during FERC Tariff System Start-provides access to internet setup options: Locate and click the **Data Recovery / Options** button which is displayed in the bottom right corner of the screen. The system displays the ETariff Data Download dialog box. If you wait too long before clicking the **Data Recovery / Options** button, the system proceeds with standard system startup, during which the text displayed on this Startup screen is updated to reflect startup status (After this screen closes, the Automatic Update message window opens and lists the application file updates as they are received). You must close the application and restart it to return to the system startup screen. If you need to download a company database again (or copy someone else's tariff), you can click on the **Data Recovery / Options** button during FERC Tariff system startup and return to the Internet Setup Options screen by selecting the **FERC Communications Setup** item from the main window's **Options** menu.

1. When the ETariff Data Download dialog box is displayed, click the **Internet Setup Options** button to perform internet setup. The system displays the Internet Setup Options dialog box.
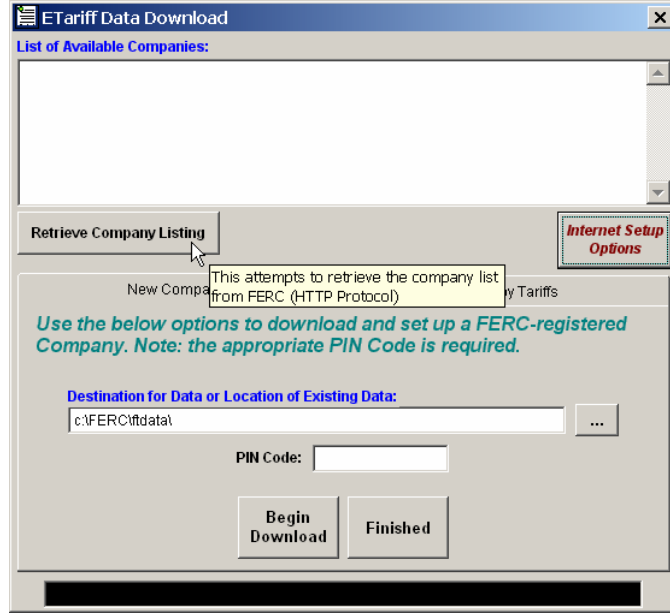
Internet Setup Options dialog box.

You will not need to add to or change any values within the two field groups that occupy the majority of the screen area (**HTTP Protocol Settings** and **FTP Protocol Settings** field groups).

Note: You can acquire the proper internet settings for the FERC Tariff system by checking the internet settings used for other FERC eForms applications currently being used at your site.

2. Locate the **FERC Address** field at the bottom of the screen.

3. Enter the value eforms1.ferc.gov for the FERC Address field value, overwriting any contents within the field.

4. Click the **Close** button to finish changing the settings. The system re-displays the ETariff Data Download dialog box.

Next, you will need to retrieve a list of available company tariff databases and download a specific company tariff database using the ETariff Data Download dialog box.

ETariff Data Download dialog box with Retrieve Company Listing button.

Designating Tariff Database Location

By default, the system will attempt to create a tariff database folder within the tariff program folder. However, it is highly recommended that you choose a directory on your network drive to store the tariff database. This permits multiple FERC Tariff System users to work with the same tariff database. In addition, you may also need designate a specific tariff database location if you are not permitted to save data to the C drive. Wherever you place the database, you will need to have complete (full) access rights.

Note: You may have to consult your system administrator to adjust the placement of your tariff database to accommodate your company's specific network configuration.

You designate a specific Tariff database location from the ETariff Data Download dialog box:

1. Click the **ellipses button** (**…**), located to the right of the **Destination for Data** field, to display the File Folder dialog box.

2. Use the File Folder dialog box to navigate to and select the desired drive and select a folder location to serve as the database location.

3. When you close the File Folder dialog box, the system returns to display of the ETariff Data Download dialog box.
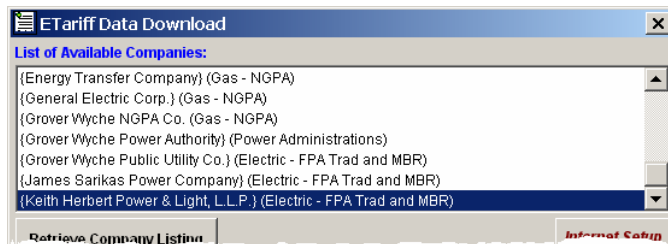
Downloading Company Data

Note: If the system has been set up previously, the **Data Recovery / Options** button displayed during FERC Tariff System Start-provides access to the company tariff data download commands.

1. When the ETariff Data Download dialog box displays, click the **Retrieve Company Listing** button.
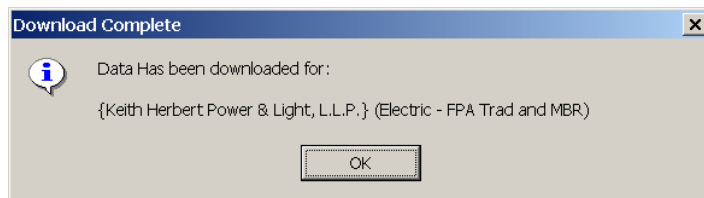
After a brief status display (located within the status bar at the bottom of the dialog box), the system retrieves the list of available companies from the FERC server and displays the list within the **List of Available Companies** list control.

List of Available Companies list control with sample company names.

2. Locate the company name within **List of Available Companies** list control.

3. Enter the Company ID into the field labeled "PIN Code" (**Note:** Downloading databases for companies during beta testing may not require Company ID entry).

4. Click the **Begin Download** button. The system begins retrieving the selected company's tariff database. The status bar reflects the database download activity.

   When the download has been completed the system display the Download Complete message box.

Download Complete message box.

5. Click the **OK** button to close the message box. The system returns to the ETariff Data Download dialog box display.

6. Repeat the company database download process for each company database you require.

7. When the system returns to display of the ETariff Data Download dialog box, click the **Finished** button. The system continues the standard startup process and opens the FERC Tariff System window.

Using an Existing Tariff Database

If you are re-installing the tariff software, you will likely want to use an existing Tariff database.

Use the following procedure to load an existing FERC Tariff System database:

1. When the ETariff Data Download dialog box is displayed, click the **ellipses button** (**…**) to display the File Folder dialog box.

2. Use the File Folder dialog box to navigate to and select the drive and folder where the existing Tariff database is stored.

   When you close the File Folder dialog box, the system returns to display of the ETariff Data Download dialog box. The selected location is displayed in the field labeled "Destination for Data or Location of Existing Data".

> **Note:** Select the folder and immediately click the **Finished** button - Do NOT click the **Begin Download** button as this may destroy data that is currently being worked on in the tariff database.

3. Click the **Finished** button.

Troubleshooting FERC Tariff System Software Installation And Setup

The following list presents error or problem conditions and the recommended action to be taken:

Error Condition	Action
Problems getting a list of companies on the ETariff Data Download dialog box…	Check FERC Address value on Internet Setup Option dialog box
The company listing is retrieved, but errors are reported when the **Begin Download** button is clicked	Check the Internet Setup options and make sure the **Force to normal (non-passive) FTP only** option is checked. Also, check the network firewall and ensure FTP is allowed to the FERC internet address.
Problems downloading your initial database…	Check your network firewall
Problems obtaining the automatic software updates from the FERC Server…	Check your network Firewall
Abnormal program termination…	Report error to FERC
Program error…	Report error to FERC

Note: You may need to coordinate permissions for the operations of the software with your Network/IT Support Personnel.

Program errors will be corrected through distribution of software patches during automatic updates performed at program startup. You must have an Internet connection to receive updates to the FERC Tariff System software and to file tariffs electronically with FERC.

Submitting Error Reports To FERC Support

To submit error reports to FERC Support, use the following guidelines:

1. Attach the FERC Tariff System's log file (ferctariff.log, by default located in c:\ferc\etariff\) to every e-mail message communicating errors to FERC Support for error troubleshooting. If you chose a different installation location, the log file will be in that folder.

2. Put the word "tariff" in the Subject of the e-mail.

3. Send e-mails about encountered software problems or internet problems to address: etariff@ferc.gov.