

BPA Customer Portal Project

Transmission Customer Forum 33
October 13, 2011



Customer Portal Overview

In support of BPA's goal to create a single site of customer information, the Customer Portal will provide BPA customers and internal BPA staff with a secure consolidated web application to access customer information such as Bills, Contracts, Meter information, and Load/Resource Forecasts.

Currently, all customers with a long-term marketing and sales agreement have been targeted (~240). So far 90 customers have signed and returned user agreements to have access to a secure customer portal online account.



DASHBOARD | METERING | BILLING | CONTRACTS | FORECASTING

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Recent Updates

Last Modified	Topic	Description/ID
03/15/11	Contracts	Energy Conservation Agreement
03/15/11	Billing	MAY11-SLC01-10170

After signing in to the Customer Portal, customers will be brought the dashboard page. The dashboard will provide customers with a quick glance of all their most up-to-date contracts, bills, meters, and forecasts. Further, the dashboard will provide quick access to BPA contacts, news, and events.

Users will have 24/7 access to CP with the exception of regularly scheduled maintenance periods.

BPA Announcements

Customer Specific Announcement
by Burdge,Bradley G - NJP-3

To all UI designers. The announcement component can be used to even attach a document!! And it has expiration policies

Customer Specific Announcement  
by Burdge,Bradley G - NJP-3

Upcoming Events [Select an event to view more details.](#)

Event	Date	Start	End	Location	Phone Bridge
Spring Operations Review Forum	5/13/2011	5/13/2011 1:00 PM	5/13/2011 2:00 PM	Conference Call Only	877-322-9654, 328457
Grand Coulee Transmission Line Replacement Project BPA OATT Workshop	5/18/2011	5/18/2011 4:00 PM	5/18/2011 7:00 PM	Coulee Dam Town Hall, 300 Lincoln Avenue, Coulee Dam, WA	
	5/26/2011	5/26/2011 8:30 AM	5/26/2011 4:00 PM	Columbia Grid Office, 8338 NE Alderwood Road	360-418-8001, 2233

 **BPA Account Executive(s)**

Theresa Rockwood
503 230-5738
Account Executive, Power

Debra Malin
503 230-5701
Account Executive, Bulk

Diego Ochoa
360-519-5704
Account Executive, Transmission

[BPA Customer Account Team](#)

 **BPA Newsroom**

Northwest Salmon



The PBS Nature program airing May 1, Salmon: Running the Gauntlet," tells part of the amazing story of Northwest salmon.

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Customer Feedback

* To: Account Executive, Power, Rockwood, Theresa E
BPA Customer Portal Administrator

- * cc:
- Load Forecasting Specialist, Anderson, Holly M
 - Metering Analyst, David Misty N
 - Revenue Analyst, Hilberg, Larry

* Business Topic: Customer Portal Feedback

* Priority: Normal

Enter Text (up to 1,000 characters)

Customer Portal Communication

If a customer has questions/concerns/feedback about the customer portal, they can choose to select either the "provide feedback" button or "submit a question" button.

Send me a copy of this message

Send

Cancel

Customer portal will also provide customers with an overview of their business profile information such as primary phone numbers, email addresses, and mailing and billing addresses

Communicate with BPA



ACCOUNT – Customer ABC

Primary Account Information

Name: Customer ABC

BES/Customer Number: 17029

Phone: 503 908-7634

Email: admin@customerABC.com

Web Address: http://www.customerABC.com

Addresses

Address Type	Address Name	Address Line 1	Address Line 2	City	ST/Province	Zip/Postal	Country
Billing	Billing Other	PO Box 788		Cascade Locks	OR	97440-2148	USA
Billing	Billing Other 2	PO Box 799		Cascade Locks	OR	97440-2148	USA
Mailing	Primary Mailing Address	PO Box 789		Cascade Locks	OR	97440-2148	USA
Street	Primary Street Address	1245 173rd Street	Suite 34	Portland	OR	97440-2148	USA
Street	Other 2 Address	1845 Vegas Blvd.		Portland	OR	97440-2148	USA

Contact Information

Name	Title	Function	Business Phone	Mobile Phone	Email Address
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Your Customer Portal Users

Name	User Permissions	Email Address
Linda Chase	Standard User	lchase@customerABC.com
Mark Stephenson	Portal Administrator	jstephenson@customerABC.com
Terry Waits	Load Forecast Editor	twaits@customerABC.com

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BPA customers and internal BPA staff will be able to access meter point data by contract exhibits, as well as a link to the MDMR system

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Select a Contract

11PB-12345, Regional Dialogue (Load Following)

Find a Meter

Filter by POD Name

Select a POD Name

Filter by Metering Resource

Select a Metering Resource

Apply Filter

Clear Filter

Selected Meter Point: 1614, Portland 115kv

Meter Points – select a meter point to view more details

Meter Point Number	Meter Point Name	POD Number	POD Name†	Metering Resource	Balancing Authority	Loss Factor kW Value	Loss Factor kWh Value	Loss Factor kV Value
1614	Portland 115kv			Resource ABC				
2644	230kv EWEB to PPL	3226	Alvey 230-PACW		BPAT	1.01	1.01	1.01
2153	Sub McKenzie - Ou	3226	Alvey 230-PACW		BPAT	1.005	1.005	1.01
2152	Sub McKenzie - In	3226	Alvey 230-PACW		BPAT	1.005	1.005	1.01
2143	Eugene 115kv Beth	221	Eugene 115 KV		BPAT	1	1	1.005
2142	Eugene 115kv Beth	221	Eugene 115 kv		BPAT	1	1	1.01
1813	Thurston/Willakenz	4114	McKenzie 115kv		BPAT	1.005	1.005	1
2043	Willow Creek S. Bu	2040	Willow Creek 115-EWEB		EWEB	1.01	1.01	1.005
2042	Willow Creek S. Bu	2040	Willow Creek 115-EWEB		EWEB	1	1	1
2041	Willow Creek N. Bu	2040	Willow Creek 115-EWEB		EWEB	1.005	1.005	1.005
2040	Willow Creek N. Bu	2040	Willow Creek 115-EWEB		EWEB	1.01	1.01	1.005

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DETAILS: 1614, Portland 115kv

Period of Service Effective Start Date 06/06/2006:

Meter Owner: Customer

Period of Service Effective End Date:06/06/2016

Manner of Service Type: Direct

Meter Location Description: Customer ABC Substation

Manner of Service Description: Resource ABC to BPA to Customer

BPA customers and internal BPA staff will be able to access a rolling two-year history of customer's bills

All users can elect to receive email notifications about new or updated billing information posted on CP.

Customers can choose to communicate through the Customer Portal, and an email will be sent directly to the AE and Revenue Analyst

Communicate with BPA

- News from BPA
- Submit Billing Questions
- Submit Feedback
- Customer Account Team

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Find a Bill

Filter by Billing Period

From: To:

Filter by Bill Type

Select a Bill Type

Filter by Bill Status

Select a Bill Status

Apply Filter Clear Filter

Selected Bill: JAN11-TRN01-10170

Bills – click on the file icon to open

Open	Bill Period	Bill ID	Bill Type	Bill Status	Issue Date	Total Dollar Amount	BPA Revenue Analyst
	03/2011	MAR11-SLC01-10170	SLICE	EXPEDITED	3/1/2011	\$4,509,678.00	Smith, John
	02/2011	FEB11-DSB01-10170	DOWNSTREAM	FINAL	2/3/2011	\$998.00	Jones, Timothy
	02/2011	FEB11-SLC01-10170	SLICE	EXPEDITED	2/3/2011	\$3,908,345.00	Smith, John
	02/2011	MAR11-DSB01-10170	DOWNSTREAM	FINAL	2/1/2011	\$1,000.00	Jones, Timothy
	01/2011	JAN11-TRN01-10170	TRANSMISSION	FINAL	2/27/2011	\$642,890.00	Thomas, Sarah
	01/2011	JAN11-PWR01-10170	POWER	FINAL	2/4/2011	\$3,123,789.00	Greene, Janet
	01/2011	JAN11-DSB01-10170	DOWNSTREAM	FINAL	1/3/2011	\$1,239.00	Jones, Timothy
	01/2011	JAN11-SLC01-10170	SLICE	EXPEDITED	1/3/2011	\$4,208,320.00	Smith, John
	12/2010	DEC10-TRN02-10170	TRANSMISSION	FINAL	1/27/2011	\$9,589.00	Thomas, Sarah
	12/2010	DEC10-TRN01-10170	TRANSMISSION	ESTIMATED	1/6/2011	\$7,240,045.00	Thomas, Sarah
	12/2010	DEC10-PWR01-10170	POWER	FINAL	1/5/2011	\$3,500,980.00	Greene, Janet
	12/2010	DEC10-DSB01-10170	DOWNSTREAM	FINAL	12/1/2010	\$976.00	Jones, Timothy
	12/2010	DEC10-SLC01-10170	SLICE	EXPEDITED	12/1/2010	\$789,435.00	Smith, John
	11/2010	NOV10-TRN01-10170	TRANSMISSION	FINAL	12/6/2010	\$812,345.00	Thomas, Sarah
	11/2010	NOV10-PWR01-10170	POWER	FINAL	12/3/2010	\$3,122,000.00	Greene, Janet
	11/2010	NOV10-DSB10-10170	DOWNSTREAM	FINAL	11/1/2010	\$1,234.00	Jones, Timothy
	11/2010	NOV10-SLC01-10170	SLICE	EXPEDITED	11/1/2010	\$4,556,783.00	Smith, John

This is disclaimer text placeholder. - Add text about not including No Activity Bills and Account Corrections.

BPA Customer Portal - Customer Name

CONTRACTS

BPA customers and internal BPA staff will be able to access all active Power and Transmission Agreements.

- Customers can quickly find a contract by typing in the contract number.
- Customers can also sort contract information by each column heading (i.e., ascending and descending).

Find a Contract

Selected Contract: CD-AB11-11XX13411

Contracts – select a contract to view related exhibits, amendments, correspondence and activities, click on the file icon to open

Open	Last Activity	Number	Description	Contract Type - Function	Execution Date	Effective Date	Expiration Date
	1/14/2011	CD-AB11-11XX13411	VA AMERICAN LAKE BUILDING 143 RETROFIT	Energy Efficiency	12/30/2010	12/30/2010	5/14/2011
	1/12/2011	PDE-MS79-93BP94774	NETTING AGREEMENT	Commercial	11/30/2011	11/30/2011	11/30/2014
	12/30/2010	EY-78-Y-83-0021	SP SALE	Commercial	12/30/2010	12/30/2010	1/6/2015
	12/30/2010	12345	STORAGE SWAP (LIBBY/ARROW)	Contract Resources	12/30/2010	12/30/2010	12/30/2016
	12/30/2010	14-03-200-05947A	ENERGY CONSERVATION AGREEMENT (ECA)	Energy Efficiency	12/30/2010	12/30/2010	12/30/2012
	12/30/2010	87654321	CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT	Corporate Strategy	12/30/2010	12/30/2010	12/30/2014
	12/14/2010	098765	AMENDATORY POWER PURCHASE (COWLITZ FALLS PROJECT)	Contract Resources	12/30/2010	12/30/2010	12/30/2013
	12/14/2010	89-765D098	NETWORK INTEGRATION TRANSMISSION SERVICE (NT)	Transmission Sales	12/14/2010	12/14/2010	12/14/2020
	12/14/2010	67-BV887-9998	POINT-TO-POINT TRANSMISSION SERVICE AGREEMENT (PTP)	Transmission Sales	12/14/2010	12/14/2010	1/6/2012
	12/14/2010	DE-MS54-85BP87332	METER INSTALLATION	Transmission Sales	9/6/2010	10/6/2010	12/6/2015

Amendments

Open	Title	Execution Date	Effective Date	Expiration Date
	Amendment 2 NEW	1/14/2011	1/14/2011	1/14/2013
	Amendment 1	12/15/2010	12/31/2010	1/5/2012

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Exhibits

Open	Title	Exhibit Version	Execution Date	Effective Date	Expiration Date
	Another Exhibit Title NEW	3	1/4/2011	1/4/2011	1/2/2012
	An Exhibit Title	1	12/14/2010	1/3/2011	1/3/2012
	Exhibit Other	2	12/14/2010	12/23/2010	12/23/2015

Correspondence

Open	Title	Execution Date
	Notification Letter	1/3/2011
	Point of Contact Change Letter	12/31/2010

Activities

This is disclaimer text placeholder.

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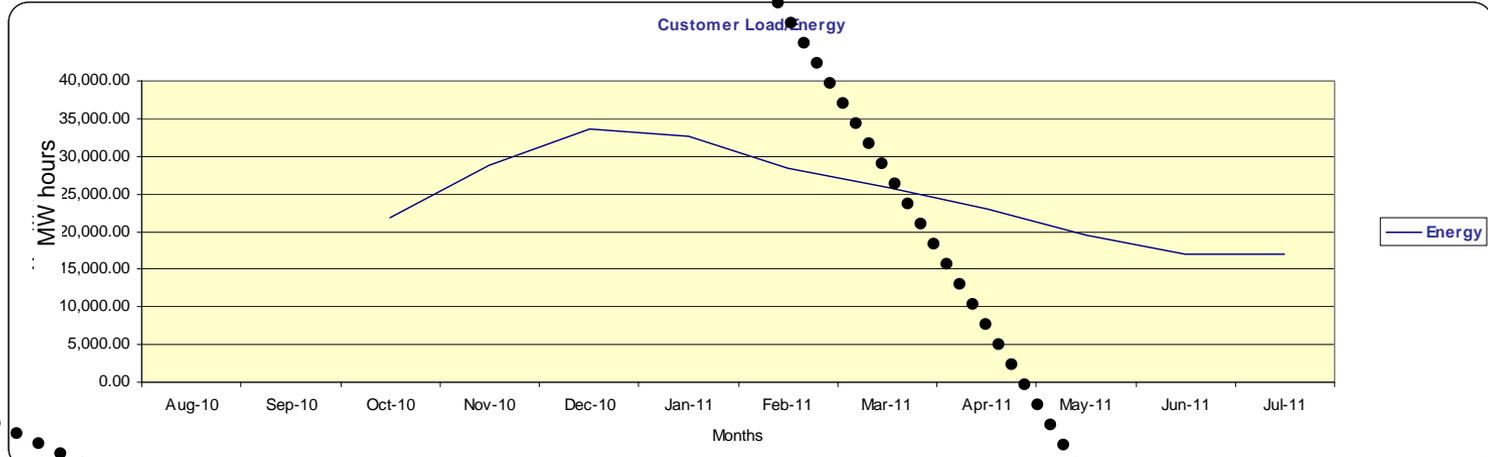
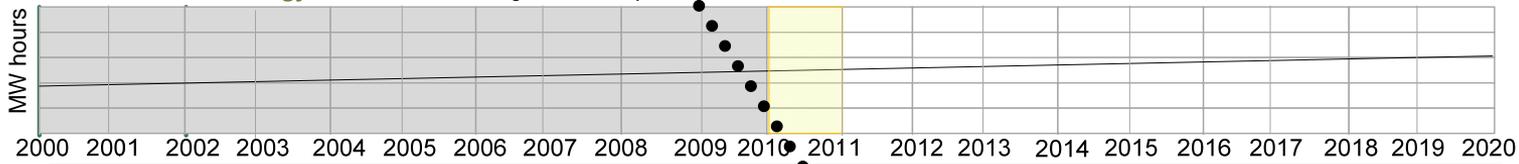
- DASHBOARD
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- BILLING
- CONTRACTS
- FORECASTING**



LOAD FORECASTING - Current Published Forecast: 04/2011

Customer Load: Energy

Select a range on the top chart and view the details on the bottom chart.



Customer Load Data

Date	Energy	Ave
8/1/2010		
9/1/2010		
10/1/2010	21,845.31	
11/1/2010	28,796.60	
12/1/2010	33,690.48	
1/1/2011	32,672.86	
2/1/2011	28,376.10	
3/1/2011	25,867.25	
4/1/2011	23,027.01	
5/1/2011	19,563.07	
6/1/2011	16,966.55	
7/1/2011	16,937.91	

BPA – Disclaimer and T & C

BPA customers and internal BPA staff will be able to access a official BPA Published Load and Resource Forecast on the Customer Portal.

- Customers will be able to see 10 years of load and resource forecast data
- The data will be shown both in graphical displays as well as in a data set/table.
- Customers can also view forecast information by POD, Energy, Average MW, NCP, CP)

Communicate with BPA

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Forecasting

- Library
- New BPA Load Forecast
- View BPA Resource Forecast
- Submit Your Load Forecast
- Submit Your Resource Forecast

BPA Load Forecast

Filter by Load

- Customer Load
 - Points of Delivery
 - POD 1
 - POD 2
 - POD 3

Display Series

- Energy
- Average MW
- Peak - NCP
- Peak - CP



- DASHBOARD
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 - [View BPA Resource Forecast](#)
 - [Submit Your Load Forecast](#)
 - [Submit Your Resource Forecast](#)

SUBMIT YOUR RESOURCE FORECAST

[How BPA Uses Your Submitted Forecast Data](#)

Enter Your Forecast Data for a Resource

Resource 1 – Last Submitted: 7/1/10

[Enter Forecast Data for an Unlisted Resource](#)

Enter Your Forecast Data for: Resource 1

Date	Energy	HLH	LLH	Average MW	Peak - CP	Super Peak
8/1/2010						
9/1/2010						
10/1/2010						
11/1/2010						
12/1/2010						
1/1/2011						
2/1/2011						
3/1/2011						
4/1/2011						
5/1/2011						
6/1/2011						
7/1/2011						

Customers will be able to submit Load and Resource forecast data for BPA to consider as often as they would like.

This can be done by either cutting and pasting data from an excel spreadsheet, modifying a pre-populated BPA form, or using a blank BPA form.

Only select customer users who have been given permissions will be able to submit load/resource data to BPA via the portal.

Once a submission is made, the customer will receive an email with a copy of what was submitted, and BPA AEs and Load Forecasters will receive email notifications that a submittal has been made.

Data Entry Tip

Forecast Data – Copy and Paste:
 1. Set up an Excel spreadsheet on your desktop that duplicates the forecast grid.
 2. Enter your forecast data (numeric input only) into Excel. *Cells for which you have no forecast data should remain empty.*
 3. Copy and paste your Excel data into the forecast grid. *Do not include Excel header row(s) with pasted data.*
 4. Click Submit. You will receive a confirmation record of your submission via email.
Note: Once you submit your forecast, you will not be able to view or edit your submission directly via the Customer Portal. However, you can resubmit your forecast data at any time.



Search:

Account | Contact | Help ?

DASHBOARD

METERING

BILLING

CONTRACTS

LOAD FORECASTING

Filter Results

Click on a filter link to display search results by category.

Any Result Type

Modified Date

[In Last Day](#)

[In Last 7 Days](#)

[In Last 30 Days](#)

Topic

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[Contracts](#)

[Load Forecasting](#)

File Type

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Search Customer Portal

Keyword(s):

Results 1-10 of 19 for: **power**

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2010 Power Services Awardees

2010 Power Services Awardees ... Outstanding Power Services Employee

<http://internal.bpa.gov/Documents/2010 Power Services Awardees.doc> - 33KB - Kamara,Mena-Yalie - DKC-7 - 6/22/2010



How power from the I-5 Project will get to you

large 500-kilovolt power lines to homes and businesses. ... amounts of electrons from where power is generated to ... The Bonneville Power Administration'

<http://internal.bpa.gov/Documents/How power from the I-5 Project will get to you.pdf> - 1MB - Kamara,Mena-Yalie - DKC-7 - 9/2/2010



Bonneville Power Administration (BPA) Reasonable Accommodation Plan

Bonneville Power Administration (BPA) Reasonable Accommodation Plan ... Bonneville Power Administration's (BPA's) plan for administering the Reasonable Accommodation progr ... BPA-Columbia Power Trades Council (CPTC) Collective Bargaining Agreement.

<http://internal.bpa.gov/Policy/Personnel Letters/PL 900-02.doc> - 79KB - Roloff,Cheryl S - NJSI-3 - 3/29/2010



Policy on Alternative Dispute Resolution (ADR) for Workplace Disputes and Conflicts at the Bonneville Power Administration

... at the Bonneville Power Administration ... Bonneville Power Administration (BPA) acknowledges that conflict is a natural product of people work ... of the Bonneville Power Administration except where specifically prohibited.

<http://internal.bpa.gov/Policy/Personnel Letters/PL 900-01.doc> - 119KB - Roloff,Cheryl S - NJSI-3 - 3/15/2010



Compressed Work Schedule for Power Schedulers

Compressed Work Schedule for Power Schedulers ... schedule for the Power Schedulers in the Duty Scheduling organization in the Power Business Line. ... in the Power Business Line.

<http://internal.bpa.gov/Policy/Personnel Letters/PL 610-01.doc> - 51KB - Roloff,Cheryl S - NJSI-3 - 3/15/2010



Compressed Work Schedule for Power Schedulers (Master Schedulers)

Compressed Work Schedule for Power Schedulers (Master Schedulers) ... Scheduling Coordination organization in the Power Business Line; ... in the Power Business Line, assigned to Power Scheduler (Master Scheduler) duties.

<http://internal.bpa.gov/Policy/Personnel Letters/PL 610-15.doc> - 56KB - Roloff,Cheryl S - NJSI-3 - 3/15/2010

Customer portal allows users to search all of their customer information on the portal as it relates to bills, contracts, meters, and Load/Resource forecasts.

Project Milestones

2010

- March: Project initiation and planning
- June to October: Detailed requirements and design with Pilot customers

2011

- **March:** Screen design review with Pilot customers
- **June:** Distribution of CP use agreements to AE/customers
- **August:** System testing with Pilot customers
 - Mason County PUD No. 3
 - Iberdrola
 - PNGC
 - Clearwater
 - Consumers
 - Northern Lights
 - Wells Rural Electric
 - Idaho Falls Power
 - Springfield Electric
 - EWEB
- **October:** Project Go-live



Systems Testing Feedback

- 100% of respondents agree “It was easy to find my way around the site.”
- 96% of respondents agree that they “would recommend this web site to a colleague.”
- 100% of respondents reported that “It is clear how screen elements (e.g. pop-ups, scrolling lists, menu options, etc.) work.”
- Confirmed Dashboard content is appropriate.
- About bills: “This is a great feature!”
- About finding a contract: “WOW! This is a dream come true for ease of use.”

(Total responses: 26 post-testing survey responses and 28 usability worksheet responses, from ten pilot customers)



BPA Customer Portal Administrator	Joe Carluccio (503) 230-4988 jacarluccio@bpa.gov
Project Lead	Kammy Rogers-Holliday (503) 230-3483 krogersholliday@bpa.gov

Please contact your BPA Account Executive if you have questions about obtaining a BPA Customer Portal account.

