

Customer Data Entry (CDE) System Access, Version 3

Effective: 12/03/13

The Customer Data Entry (CDE) system is a BPA Transmission Services access point that allows a Customer to obtain information pertaining to its Ancillary Services, Loss Return obligations, portfolio manager, and contract portfolio manager.

A. CDE System Access Requirements

1. Customer must have completed the [New Customer Application Process for Transmission Services Business Practice](#) with BPA Transmission Services and is an active Transmission Service Customer or an active Generation Interconnection Customer, prior to requesting access to the CDE system.
2. Customer must have an Open Access Technology International, Inc. (OATI) WebCares Certificate to access the CDE system to view and update data. Information on obtaining a WebCares Certificate is available at: <http://www.oaticerts.com/repository/oaticerts.html>
3. Customer must complete and submit the CDE System Access form (see "Forms" below) via email to the CDE Support Staff at txcbs@bpa.gov.

B. CDE Security Officers

1. Customer's CDE Administrative Contact (identified on the CDE System Access form) must designate only two (Primary and Secondary) Security Officers who have the authority to:
 - a. approve user access or group access to the Customer's data and information in the CDE system;
 - b. maintain user lists and set user privileges; and
 - c. add, modify, or remove users.
2. To change Security Officer information, the CDE Administrative Contact must complete and submit an updated CDE System Access form via email to txcbs@bpa.gov.
3. Periodically the CDE Support Staff will:
 - a. confirm Security Officer designations
 - b. contact the Security Officer for user list review.

C. CDE Users

1. The designated Security Officer must submit user access or group access requests via email to: txcbs@bpa.gov and include the following information for each new user:
 - a. first and last name for individual users or group name for a shared account;
 - b. user's email address;
 - c. user's phone number (Indicate if the phone number has a secure voice mail, which is password protected and accessible only by the individual, for accepting messages.);

- d. user's privilege level: "Read only" or "Update". ("Update" applies only to Plant Deviation and Load Data displays.); and
 - e. OATI Certificate information, if the Customer's certificates are private, the CDE Support Staff will contact the Customer to request this information if necessary.
2. The CDE Support Staff will only accept requests to add, modify, or remove users from the designated Security Officers identified on the CDE System Access Form.

C. Third Party CDE Access

1. Customer may authorize another Entity, such as a Scheduling Agent or Loss Provider (Third Party), to see its data and information in the CDE system by identifying the Third Party on the CDE System Access Form.
2. The Third Party must have submitted its own CDE System Access Form and obtained its own access to the CDE system.
3. The CDE Support Staff will notify by email the Security Officers of both the Customer and the Third Party when the Third Party can access the Customer's data.
4. Customer may remove a Third Party's access, or authorize a new Third Party access to its data by submitting an updated CDE System Access Form to txcbs@bpa.gov.

D. CDE Logon/Time Out/Password Reset

1. The CDE Support Staff will contact individual users to provide logon information. The information must be communicated in a secure manner (direct contact with an individual or secured voice mail) and cannot be shared.
2. The CDE Support Staff will contact the Customer's Security Officers to provide group logon information.
3. A logon user name cannot be changed once it is established.
4. A time out will occur within two hours if there is no user activity in the CDE system.
5. Password reset requests for:
 - a. individual user - the individual user must submit the password reset request via email to txcbs@bpa.gov or by phone to the CDE Support Staff at (360) 418-2163.
 - b. group access - the Security Officer must submit the password reset request txcbs@bpa.gov or by phone to the CDE Support Staff at (360) 418-2163.

E. CDE System Displays

1. The CDE system provides Customers access to the following displays:
 - a. Contract Portfolio Management: Customers with multiple-to-multiple reservation configurations may view their Transmission Service Requests, e-Tags, and contract information.

- b. Losses:
 - i. Daily Loss Report: Loss obligations
 - ii. Loss Imbalance Report: Over/under returned losses
 - iii. Monthly Total Loss Report
 - c. Portfolio Management
 - d. Ancillary Services:
 - i. Load Data: Load estimates
 - ii. Plant Deviations: Generation estimates
 - iii. Self Supply Operating Reserves Integrated Delivery Amounts
 - iv. Self Supply Operating Reserves Obligations
 - e. Shared Path Summary: Owner/Non-Federal Participant (NFP) shares and scheduled use of the Northern Intertie and Southern Intertie
 - f. The CDE system uses Extensible Markup Language (XML). For technical assistance accessing data using XML, send an email request to txcbs@bpa.gov.
2. BPA retains the right to revoke access to the CDE system if it determines that the Customer is using the CDE system to violate the law or BPA policies.

F. Additional Information

Related Business Practices

- Energy Imbalance Service
- Establishing Minimum Generation Levels and Maximum Ramp Rates for Oversupply Management
- Generation Imbalance Service
- New Customer Application Process for Transmission Service
- Operating Reserves
- Real Power Loss Returns
- Scheduling Agent
- Scheduling Transmission Service

Forms

- CDE System Access Form

Version History

Version 3	Updates the CDE process.
Version 2	12/03/13 Added "Monthly Total Loss Report" to step B.1.a.iii.
Version 1	01/29/10 New business practice.