

Customer Data Entry ~~Implementation~~ (CDE) System Access, Version ~~2~~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.
- ~~1. To access the CDE application to view and update data, a~~ Customer must:
 - ~~1-2.~~ Have ~~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 ~~Certificates~~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

- ~~a.~~ Customer's CDE Administrative Contact (identified on the CDE System Access form) its ~~Transmission Account Executive (AE).~~
1. Designate ~~must designate only~~ two (Primary and Secondary) Security Officers who will have the authority to:
 - a. approve user access or group access to the Customer's data and information in the CDE system;
 - ~~a-b.~~ maintain user lists, and set user privileges; and
 - ~~b.~~ Provide the following information for each Security Officer to its AE:
 - i. NERC Entity Code
 - ii. First and last name
 - iii. Phone number
 - iv. Email address
 - ~~c.~~ If there are changes to the Security Officer's information, the Customer must contact its AE to update Security Officer Information.
 - ~~b-c.~~ BPA Transmission Services will accept only requests to add, modify, or remove users from the Security Officers.
2. Such requests must be submitted via email to the CDE Support Staff at 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 secured secure voice mail, which is password protected and accessible only by the individual, for accepting voice messages.);
 - d. User's privilege level: "Read only" or "Update". ("Update" applies only to ancillary services Plant Deviation and Load Data displays.); and
 - e. OATI Certificate information, if the Customer's certificates are private. BPA Transmission Services, 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 Viewing CDE Data Access

1. A Customer must contact its AE to identify may authorize another Entity, such as a Scheduling Agent or loss provider, Loss Provider (Third Party), to see its data and provide the following information: in the CDE system by identifying the Third Party on the CDE System Access Form.
 - i. Company Name
 - ii. NERC Entity Code
2. The third party Third Party must have submitted its own CDE System Access Form and obtained its own access to the CDE system.
3. BPA Transmission Services The CDE Support Staff will notify by email the Security Officers of both the Customer and the third party Third Party when they the Third Party can access the Customer's data.
4. If the Customer no longer wants may remove a third party Third Party's access, or authorize a new Third Party access to view its data or if the Customer wants a different third party by submitting an updated CDE System Access Form to see its data, the Customer must contact its AE to update third party viewing information. txcbs@bpa.gov.

D. CDE Logon/Time Out/Password Reset

1. BPA Transmission Services 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. BPA Transmission Services 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.

~~5. User Time Out~~

- ~~4. If a time out will occur within two hours if there is no user activity in the CDE within two hours, a timeout will occur. system.~~

~~6. Password Reset~~

~~5. Requests to reset the password requests for:~~

- ~~a. for an 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.~~

- ~~a-b. must be made by the individual user group access - the Security Officers cannot request a submit the password reset request txcbs@bpa.gov or by phone to the CDE Support Staff at (360) 418-2163. for an individual user but may request to reset the password for group user logons.~~

- ~~5. Requests must be made via email to txcbs@bpa.gov or by phone to the CDE support staff at (360) 418-2163 or (360) 418-2201.~~

~~7. Periodically BPA Transmission Services will:~~

- ~~a. Confirm Security Officer designation
b. Review the user list by contacting the Security Officer.~~

~~B~~

~~E. CDE Applications System Displays~~

- ~~1. The CDE application provides 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 displays.~~

- b. Losses:
 - i. Daily Loss Report: Loss obligations
 - ii. Loss Imbalance Report: Over/under returned losses
 - iii. Monthly Total Loss Report
 - c. Portfolio Management
 - ~~b. Customers with multiple to multiple reservation configurations may view their TSRs, e-Tags, and contract information.~~
 - ~~c. Shared Path Summary: Owner/Non-Federal Participant (NFP) shares and scheduled use of the Northern Intertie and Southern Intertie~~
 - 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 ~~applications uses~~ 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.

GF. Additional Information

Related Business Practices

- ~~Real Power Loss Returns~~ Energy Imbalance Service
- ~~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
- ~~Reservation Agent~~
- Scheduling Agent
- Scheduling Transmission Service

Forms

- CDE System Access Form

Version History

<u>Version</u> <u>3</u>	<u>Updates the CDE process.</u>
Version	12/03/13 Added "Monthly Total Loss Report" to

2	step B.1.a.iii.
Version 1	01/29/10 New business practice.