



## Customer Data Entry Implementation (CDE), Version 1

Effective: 12/03/13

Customer Data Entry (CDE)<sup>1</sup> is a BPA Transmission Services access point that allows a Customer<sup>2</sup> to obtain information pertaining to its Ancillary Services, Loss Return obligations, portfolio manager, and contract portfolio manager.

Version 2 added "Monthly Total Loss Report" to Step B.1.a.iii.

### A. CDE Access

1. To access the CDE<sup>3</sup> application to view and update data, a Customer must:
  - a. Have an Open Access Technology International, Inc. (OATI<sup>4</sup>) WebCares Certificate. Information on obtaining WebCares Certificates is available at: <http://www.oaticerts.com/repository/oaticerts.html>
  - b. Execute a CDE Agreement with BPA Transmission Services. Contact your Transmission Account Executive for the CDE Agreement.
  - c. Designate two Security<sup>5</sup> Officers that maintain user lists and set user privileges.
    - i. The obligations and duties of a Security Officer are defined in the CDE Agreement.
    - ii. If there are changes to the Security Officer's information, an Exhibit A must be revised. Contact your Account Executive to update Security Officer Information.

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<sup>1</sup>A 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.

<sup>2</sup>Any customer taking service under Use of Facilities (UFT), Formula Power Transmission (FPT), Integration of Resources (IR), Part II or Part III of the OATT.

<sup>3</sup>Customer Data Entry

<sup>4</sup>Open Access Technology International System

<sup>5</sup>Letter of Credit, deposit into an Escrow Account or cash deposit with BPA that the customer will establish in accordance with the Network Open Season business practice.

2. BPA Transmission Services will accept only requests to add, modify, or remove users from the Security Officers identified in the executed CDE Agreement.
  - a. Such requests must be submitted via email to the CDE Support Staff at [txcbs@bpa.gov](mailto:txcbs@bpa.gov). Include the following information for each new user:
    - i. First and last name for individual users or group name for a shared account.
    - ii. User's email address
    - iii. Phone number: Indicate if phone is a secured voice mail (password protected and accessible only by the individual) for accepting voice messages.
    - iv. User's privilege level: "Read only" or "Update". Update applies only to ancillary services Plant Deviation and Load Data displays.
    - v. OATI Certificate information, if the Customer's certificates are private. BPA Transmission Services CDE Support staff will contact the Customer to request this information if necessary.
3. Third Party Viewing CDE Data
  - a. A Customer may identify another **Entity**<sup>1</sup>, such as a **Scheduling Agent**<sup>2</sup> or loss provider, to see its data by listing the Entity/company in Exhibit A of its CDE Agreement.
  - b. The third party must have an executed CDE Agreement in place with BPA Transmission Services.
  - c. BPA Transmission Services will notify by email the Security Officers of both the Customer and the third party when they can access the data.
  - d. If the Customer no longer wants a third party to view its data or if the Customer wants a different third party to see its data, the Customer must execute a new Exhibit B. Contact your Account Executive to update third party viewing information.
4. Logon
  - a. BPA Transmission Services will contact individual users to provide logon information. The information must be communicated in a secure manner (direct contact with an individual) and cannot be shared.
  - b. BPA Transmission Services will contact the Customer's Security Officers to provide group logon information.
  - c. A logon user name cannot be changed once it is established.

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<sup>1</sup>A load, generator, generation provider, Transmission Customer, or other party.

<sup>2</sup>An entity designated by the Customer to prepare and submit transmission schedules and associated forecasts on behalf of that Customer.

5. User Time Out
  - a. If there is no activity in CDE within two hours, a timeout will occur.
6. Password Reset
  - a. Requests to reset the password for an individual user must be made by the individual user. Security Officers cannot request a reset for an individual user but may request to reset the password for group user logons.
  - b. Requests must be made via email to [txcbs@bpa.gov](mailto: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. CDE Applications

1. The CDE applications provide Customers access to the following information displays:
  - a. Losses:
    - i. Daily Loss Report: Loss obligations
    - ii. Loss Imbalance Report: Over/under returned losses
    - iii. Monthly Total Loss Report
  - b. Portfolio Management
  - c. Customers with multiple-to-multiple reservation configurations may view their TSRs, e-Tags, and contract information.
  - d. Shared Path Summary: Owner/Non-Federal **Participant**<sup>1</sup> (NFP) shares and scheduled use of the Northern Intertie and Southern Intertie

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<sup>1</sup>An entity that operates a Wind Facility or other Variable Energy Resource within BPA's Balancing Authority Area and that has signed a Supplemental Service Agreement agreeing to supply or purchase Supplemental Services for that Wind Facility.

- e. Ancillary Services:
- i. Load Data: Load estimates
  - ii. Plant Deviations: Generation estimates
  - iii. Self Supply **Operating Reserves**<sup>1</sup> Integrated Delivery Amounts
  - iv. Self Supply Operating Reserves Obligations
- f. The CDE applications use Extensible Markup Language (XML). For technical assistance accessing data using XML, send an email request to [txcbs@bpa.gov](mailto:txcbs@bpa.gov).

## C. Additional Information

### Related Business Practices

- Real Power Loss Returns
- **Energy Imbalance**<sup>2</sup> Service
- **Generation Imbalance Service**<sup>3</sup>
- New Customer Application Process for Transmission Service
- Operating Reserves
- **Reservation Agent**<sup>4</sup>
- Scheduling Agent
- Scheduling Transmission Service

### Version History

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

<sup>1</sup>(Also called Contingency Reserves) The combination of Operating Reserve-Spinning Reserve Service and Operating Reserve-Supplemental Reserve Service. Fifty percent of Operating Reserves Services must be Spinning Reserves Services.

<sup>2</sup>Difference occurring between hourly scheduled amount and hourly metered (actually-delivered) amount associated with transmission to a load located in BPA's Balancing Authority Area or from a generation resource located within BPA's Balancing Authority Area.

<sup>3</sup>The Generation Imbalance component of Variable Energy Resource Balancing Service (VERBS).

<sup>4</sup>An entity authorized to submit and process Transmission Service Requests (TSR) on behalf of the Customer. This entity is a registered customer of Open Access Technology International, Inc. (OATI).