

# **Customer Data Entry**

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## **BPA Transmission Business Practice**

**Version 4**

**2/28/2017**

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The Customer Data Entry (CDE) is a system provided by BPA Transmission Services that allows a Customer to access information pertaining to their Ancillary Services, Loss Return obligations, portfolio manager, contract portfolio manager and authorize a third party to view their information and data.

For more information, visit the [BPA Transmission Business Practices webpage](#) or submit questions to [techforum@bpa.gov](mailto:techforum@bpa.gov).

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## A. CDE System Access Requirements

1. Customer must have completed the [New Customer Application Process for Transmission Service](#) 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. Hold an active NAESB EIR number (also known as a NERC code) from <https://www.naesbwry.oati.com/NAESBWRY/sys-index.wml>.
4. Customer must complete and submit the CDE System Access form via email to BPA's CDE Support Staff at [txcbs@bpa.gov](mailto:txcbs@bpa.gov).

## B. CDE Security Officers

1. A Customer's CDE Administrative Contact (identified on the [CDE System Access form](#)) must designate 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 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](mailto:txcbs@bpa.gov).
3. Periodically BPA's CDE Support Staff will contact a Security Officer to:
  - a. Confirm Security Officer designations
  - b. Review the user list

## C. Third Party CDE Access

1. The CDE Administrative Contact 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. BPA's 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. A 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](mailto:txcbs@bpa.gov).

## D. CDE Logon/Time Out/Password Reset

1. BPA's 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:
  6. Individual user: The individual user must submit the password reset request via email to [txcbs@bpa.gov](mailto:txcbs@bpa.gov) or by phone to the CDE Support Staff at (360) 418-2163.
  7. Group access: The Security Officer must submit the password reset request [txcbs@bpa.gov](mailto: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.
    - i. Losses:

- Daily Loss Report: Loss obligations
  - Loss Imbalance Report: Over/under returned losses
  - Monthly Total Loss Report
- b. Ancillary Services:
    - i. Self Supply OR Integrated Delivery Amounts
    - ii. Self Supply OR Obligations
  - c. Load Data: Load estimates
  - d. Plant Deviations: Generation estimates, generation minimum, generation maximum and hourly unit commitment
  - e. Shared Path Summary: Owner/Non-Federal Participant (NFP) shares and scheduled use of the Northern Intertie and Southern Intertie
2. The CDE system uses Extensible Markup Language (XML). For technical assistance accessing data using XML, send an email request to [txcbs@bpa.gov](mailto:txcbs@bpa.gov).
  3. 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.