

**Southwest Power Pool Portal
Metering Agent Local Security
Administrator User's Guide**

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1. Overview

This document serves as a guide for the Metering Agent (MA) Local Security Administrator (LSA). The MA LSA is responsible for creating and maintaining the user accounts of the Commercial Operations System (COS) Portal. Users of this guide should read and understand policies associated with the LSA role.

This guide assumes that an individual has been registered as the LSA for a Metering Agent. All activities related to the LSA registration process are outside of the scope of this document.

2. Logging On to the Portal

All LSAs and users must have a valid digital certificate installed on the machine they are using to access the Portal. LSAs gain access by completing the LSA registration process. Please contact Customer Relations at question@spp.org with questions pertaining to LSA registration. Individual users will be given access to the Portal by their designated LSA.

2.1 Logon

Once the required steps have been completed to be registered as a Portal User, the Portal can be accessed by following these instructions:

1. Using Internet Explorer, browse to the **SPP Portal Login** page <<https://portal.spp.org/SPP>>.
2. From the **Client Authentication** dialog, select the digital certificate designated for Portal use (Figure 2.1.1.), and then click **OK**.
3. If the **Security Policy** page (Figure 2.1.2) appears, click **Accept**.
4. The **Portal Welcome** page will be displayed.

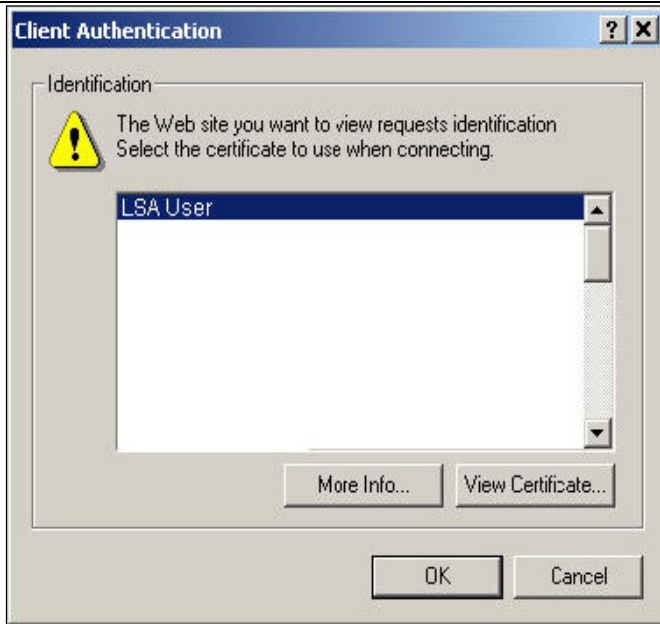


Figure 2.1.1 Client Authentication

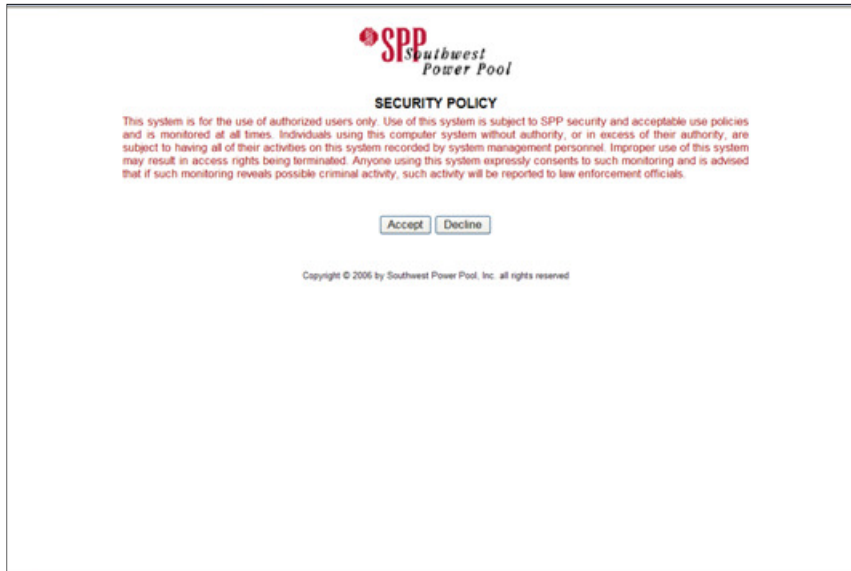


Figure 2.1.2 Security Policy

2.2 Portal Welcome Page

After the LSA has successfully logged on, the user will arrive at the **Portal Welcome** page (Figure 2.2.1). The user name, company name, and date are located in the upper right-hand corner of the page. The main body of the page contains a welcome message, Customer Relations contact information, and any current announcements. A menu bar displayed across the top of the Portal page enables an LSA to access all of the views and functions within the Portal to which they are assigned.

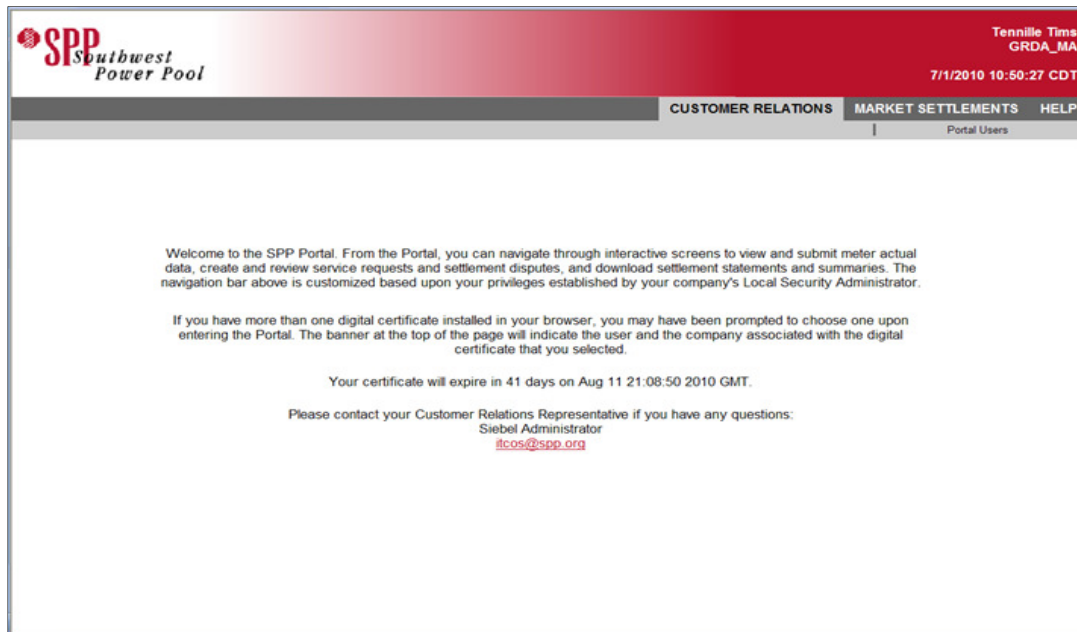


Figure 2.2.1 Portal Welcome Page

3. Create and Maintain Users

From SPP's perspective, an LSA is the only person from an Asset Owner who can perform limited user management for the Asset Owner's users. The Metering Agent LSA is responsible for adding, updating, and coordinating all information associated with general users. Besides the LSA role, which permits creating and maintaining Portal users, there are no other roles assigned to an LSA (**View Calibration** role is automatically assigned to all users, including LSAs).

3.1 Portal User Page – Create User

Once a user obtains a valid digital certificate and has been created in the Portal as an LSA, he or she can begin adding new Portal users for the Metering Agent (MA). In order to create a new user, an LSA will need the user's contact information, digital certificate

serial number, and issuer. Additionally, the LSA will be responsible for assigning the roles that the user will need to perform his or her job.

LSAs are responsible for creating and updating users for their Metering Agent (MA). The **Create/Update User** page is designed to facilitate assigning roles for users, and is explained in the following sections.

3.1.1 Accessing the Create User Page

1. Make sure you are on the **Customer Relations** tab.
2. From the **Portal Users** menu, choose **Create** (Figure 3.1.1).

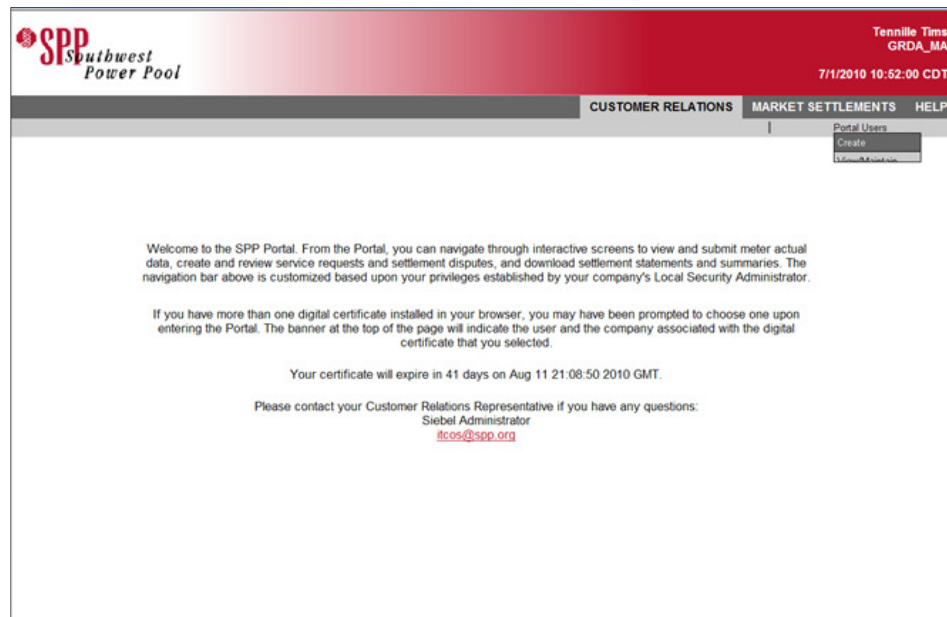


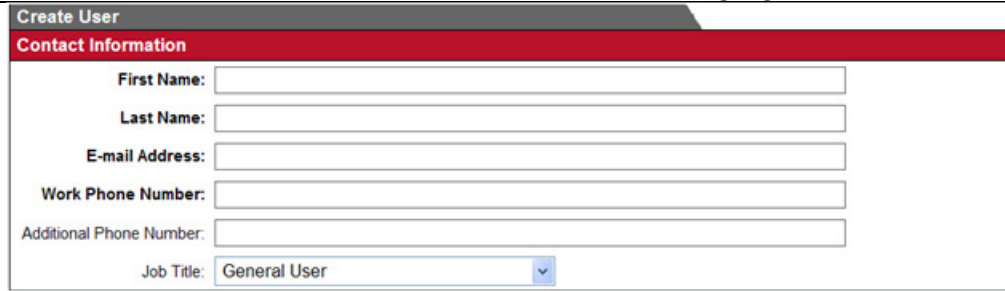
Figure 3.1.1 Accessing Create User Page

3.1.2 Contact Information Area

The **Contact Information** area enables LSAs to enter basic contact information for Portal users.

Fields in the **Contact Information** area are as follows (Figure 3.1.2).

- **First Name:** User's first name (required)
- **Last Name:** User's last name (required)
- **E-mail Address:** User's e-mail address (required)
- **Work Phone Number:** User's main contact number (required)
- **Additional Phone Number:** Alternate phone number (optional)
- **Job Title:** User's job category (required)



Create User

Contact Information

First Name:

Last Name:

E-mail Address:

Work Phone Number:

Additional Phone Number:

Job Title:

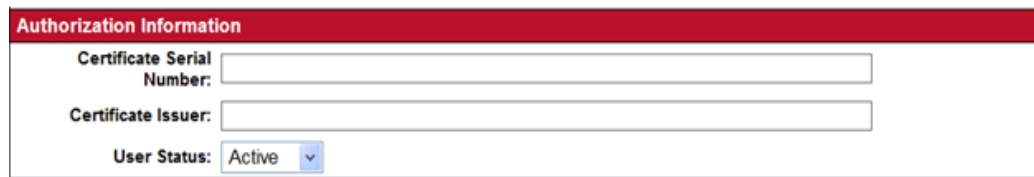
Figure 3.1.2 Contact Information Area on Create User Page

3.1.3 Authorization Information Area

The **Authorization Information** area is designed to enable LSAs to enter digital certificate information to configure user access.

Fields in the **Authorization Information** area are as follows (Figure 3.1.3).

- **Certificate Serial Number:** User's OATI certificate serial number (required)
- **Certificate Issuer:** User's OATI issuer (required)
- **User Status:** Active or Inactive (required)



Authorization Information

Certificate Serial Number:

Certificate Issuer:

User Status:

Figure 3.1.3 Authorization Information Area on Create User Page

3.1.4 Role Assignment Area

The Role Assignment area enables LSAs to assign specific roles to users.

Fields in the **Role Assignment** area are as follows (Figure 3.1.4).

- **View Contacts:** Permits the user to view a list of all contacts for their Metering Agent.
- **User Messages:** Permits the user to view messages generated from the service request activity and settlements for their Metering Agent.
- **View Interchange Meter Data:** Permits the user to view interchange meter data that has been uploaded for their Metering Agent. (This role is only available if the Metering Agent is associated with Interchange Assets or Settlement Areas.)
- **Upload/View MVARh Data:** Permits the Metering Agent to upload and view MVARh files.
- **View and Maintain Service Requests:** Permits the user to create and view Service Requests for their Metering Agent.
- **View Entity Relationship Model:** Permits the user to view/download the entity relationship model for their Metering Agent.
- **Upload/View Meter Data:** Permits the Metering Agent to upload and view meter data files.

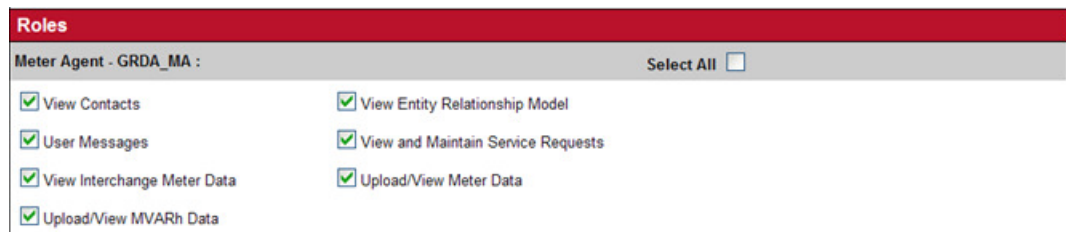


Figure 3.1.4 Role Assignment Area

3.2 Portal User Page – View/ Maintain User

Whenever a user's contact information or digital certificate information changes, the LSA can update the information using the View/Maintain user functionality.

3.2.1 Accessing the View/Maintain Page

1. Make sure you are on the **Customer Relations** tab.
2. From the **Portal Users** menu, choose **View/Maintain** (Figure 3.2.1).

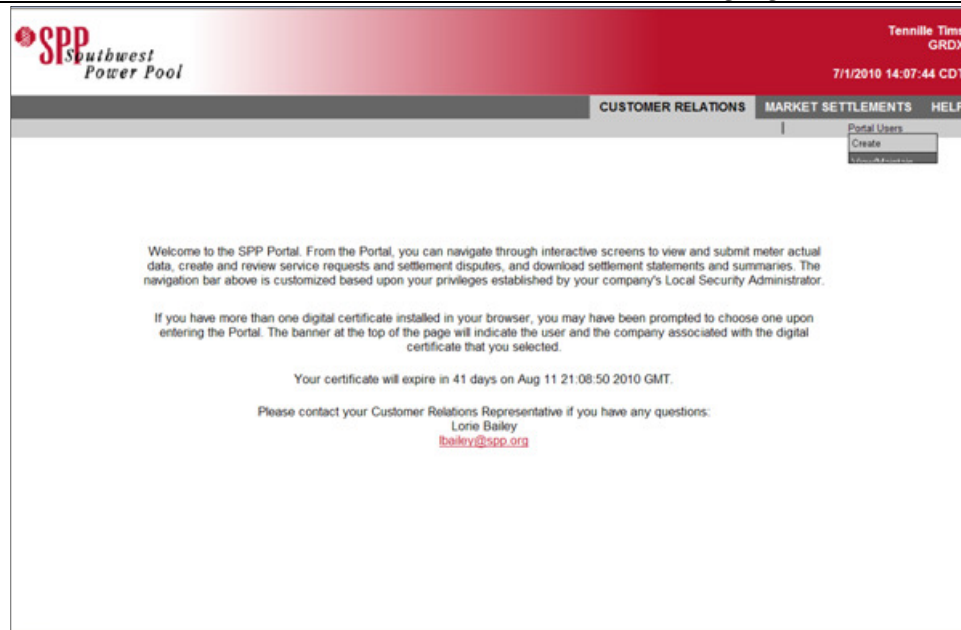


Figure 3.2.1 Accessing the View/Maintain User Page

3.2.2 View User List Page

The **View User List** page displays all of the active and inactive users who have been set up from the Metering Agent (Figure 3.2.2).

- To view user details, click the name of the user.
- To send an e-mail message to a user, click the e-mail address of the user. This will open a new e-mail message window in your default e-mail application.

View User List		
Name	Email Address	User Status
celentias Application	celentias@grda.com	Active
Transmission BCC	trans@grda.com	Active
Generation BCC	oper@grda.com	Active
Doug Callison	dcallison@grda.com	Active
Jeff Carol	jcarroll@grda.com	Active
Christopher Dill	cdill@grda.com	Active
Matt Foote	mfoote@grda.com	Active
Errol Goad	egoad@grda.com	Active
Richard Gulotta	rgulotta@grda.com	Active
Ed Hammons	ehammons@grda.com	Active

1 to 10 of 37 total Next

Figure 3.2.2 View User List Page

3.2.3 View User Details Page

The **View User Details** page displays all of the information for the selected user. It details the user's contact information, authorization information, and assigned

roles (Figure 3.2.3). On the **User Details** page, click **Update** to make changes to the user's information.

Contact Information	
First Name:	Tennille
Last Name:	Tims
E-mail Address:	tims@spp.org
Work Phone Number:	(501) 688-1651
Additional Phone Number:	
Job Title:	LSA
Authorization Information	
Certificate Serial Number:	4d-c8-63-a7-00-00-00-1c-58
Certificate Issuer:	C=US, S=MN, L=Minneapolis, O=Open Access Technology International Inc, CN=OATI WebCARES Issuing CA
User Status:	Active
Roles	
Transmission Owner - OG&E ELECTRIC SERVICES:	
Local Security Administrator	
Market Operation Roles:	
no roles assigned	
<input type="button" value="Back"/> <input type="button" value="Update"/>	

Figure 3.2.3 User Details Page

3.2.4 Update User Page

The **Update User** page displays all of the information for the selected user (Figure 3.2.4), and enables you to update any of the following fields.

- E-mail Address
- Work Phone Number
- Additional Phone Number
- Job Title
- Certificate Serial Number
- Certificate Issuer
- User Status
- Roles Selection Information

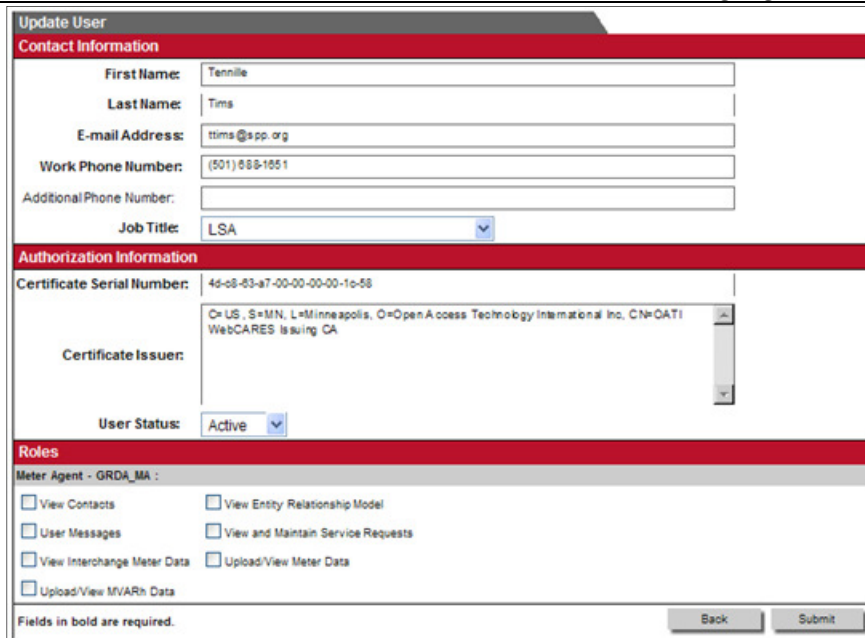


Figure 3.2.4 Update User Page

When updates to the user's details are complete, click **Submit**. The **Update User Confirmation** page (Figure 3.2.5) will be displayed.

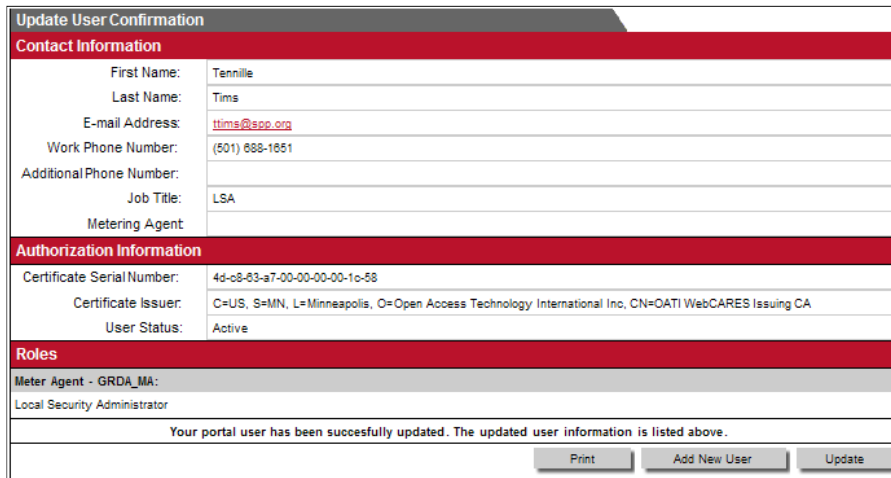


Figure 3.2.5 Update User Confirmation Page

- To create a new user from this page, click **Add New User**. The **Create User** page will be displayed.
- To make updates to the currently displayed user, click **Update**. The **Update User** page will be displayed.

4. Frequently Asked Questions

Portal User Question/Issue	Response
I am getting a timeout error when accessing the Portal.	Confirm that you are accessing the correct URL. The browser will not release the certificate when you try to navigate to a URL containing /gse/index .
What is the wait time (or timeout value) for inactivity before the Portal shuts down automatically (logs me off)?	12 hours
I have a new certificate from OATI, but when I use it to log on to the Portal, it gets an error.	Ensure that your certificate has been updated in the Portal.