



**Southwest Power Pool Portal  
Market Participant Local Security  
Administrator User's Guide**

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## 1. Overview

This document serves as a guide for the Market Participant (MP) Local Security Administrator (LSA). The MP LSA is responsible for the creating and maintaining the user accounts of the Commercial Operation 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 Market Participant. All activities related to the LSA registration process are outside the scope of this document.

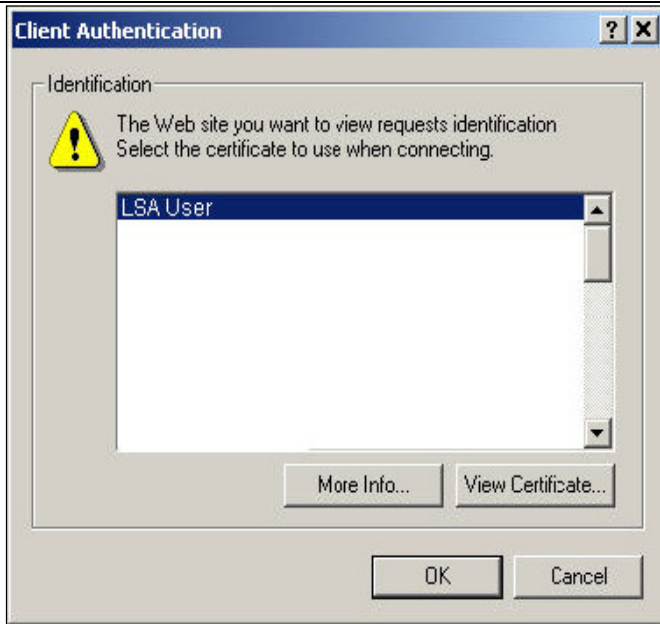
## 2. Logging into the Portal

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](mailto:question@spp.org) with questions pertaining to LSA registration. Individual users will be given access to the Portal by their designated LSA.

### 2.1 Login

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.

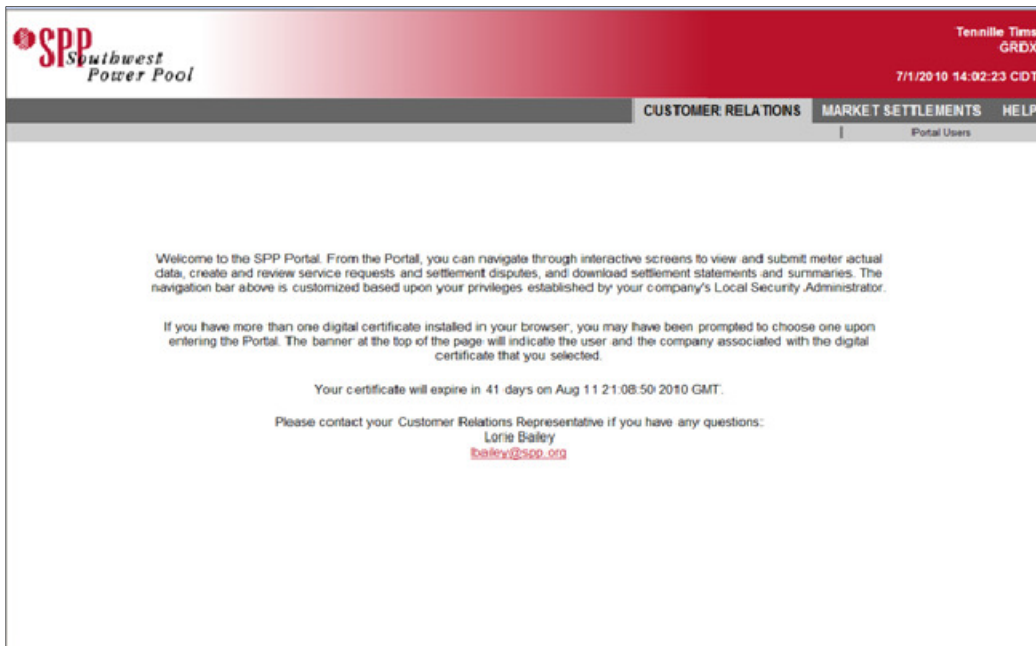


Figure 2.2.1 Portal Welcome Page

## 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 Market Participant 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 Screen – 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 their Market Participant (MP). 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 Market Participant (MP). 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).

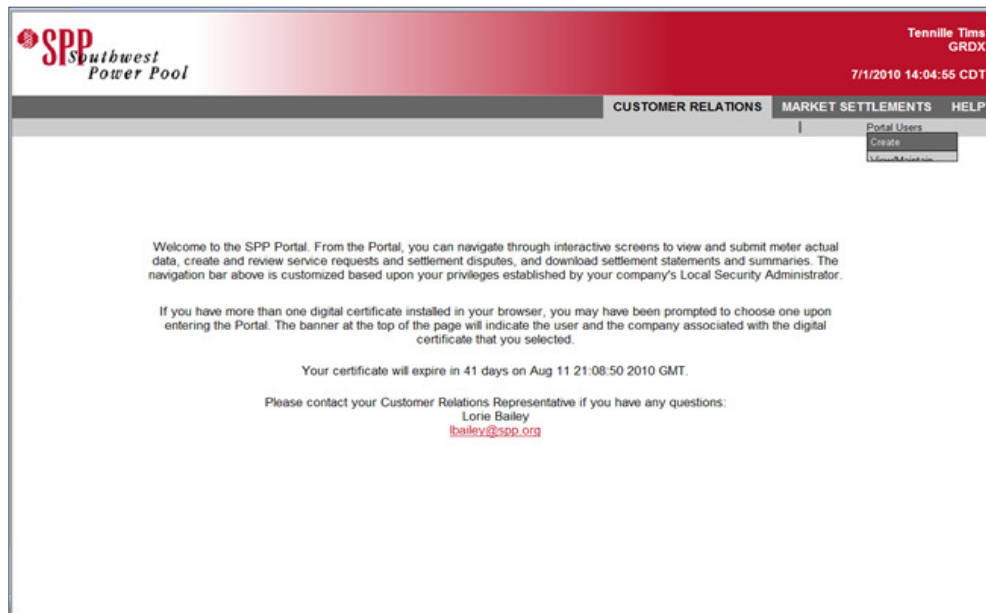


Figure 3.1.1 Accessing Create User Page

### 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)
- **Email Address:** User's email 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)

The screenshot shows a web form titled 'Create User'. Below the title is a red header bar labeled 'Contact Information'. The form contains the following fields: 'First Name:' with a text input box; 'Last Name:' with a text input box; 'E-mail Address:' with a text input box; 'Work Phone Number:' with a text input box; 'Additional Phone Number:' with a text input box; and 'Job Title:' with a dropdown menu currently displaying 'General User'.

**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)

The screenshot shows a web form titled 'Authorization Information'. It contains the following fields: 'Certificate Serial Number:' with a text input box; 'Certificate Issuer:' with a text input box; and 'User Status:' with a dropdown menu currently displaying 'Active'.

**Figure 3.1.3 Authorization Information Area on Create User Page**

### 3.1.4 Role Assignment Area

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

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

1. Market Participant Level Roles

- **View Contacts:** Permits the user to view a list of all contacts for their Market Participant.
- **View User Messages:** Permits the user to view messages generated from the service request activity and settlements for their Market Participant.
- **View Settlement Statements:** Permits users to view/download settlement statements, summaries, payout and invoices for their Market Participant.
- **View Entity Relationship Model:** Permits the user to view/download the entity relationship model for their Market Participant.
- **View and Maintain Service Requests:** Permits the user to create and view Service Requests for their Market Participant.

2. Asset Owner level Roles

- **View Entity Relationship Model:** Permits the user to view/download the entity relationship model for the Asset owner.
- **View Meter Data:** Permits the user to view meter data for any of their Asset Owners.

3. Market Operations Level Roles

- **View Maintain Capacity Plans:** Permits users to view and update AS Capacity Plans.
- **View Maintain Capacity Bids:** Permits users to view AS Capacity Summary by Date and Hour Ending.
- **View Operator Notification:** Permits users to view Notifications sent to their XML Listener.
- **View Capacity Anc. Svc. Obligation:** Permits users to view AS Obligations by Date and Hour Ending.
- **View MP Over/Under Commitment:** Permits users to view Over-commitment and Under-commitment values by Date, Control Area and Interval.
- **View Maintain XML Listener:** Permits users to view and update their XML Listener URLs.
- **View Maintain Resource Plans:** Permits users to view and update Resource Plans.
- **View Maintain Energy Imbalance Bids:** Permits users to view and update EIS Offer Price Curves.
- **View Maintain Market Clearing Price for Capacity:** Permits users to view Energy Clearing Prices by Date, Hour Ending and Settlement Location.
- **View Maintain MP Forecasts:** Permits users to view and update MP Load Forecast.
- **Deliverability Analysis:** Permits users to view Deliverability Analysis (SFTDA) Information by Date, Event ID, Hour Ending and Constraint.



Roles	
<b>Market Participant - GRAND RIVER DAM AUTHORITY User Roles:</b> <span style="float: right;">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Contacts	<input type="checkbox"/> View Entity Relationship Model
<input type="checkbox"/> User Messages	<input type="checkbox"/> View and Maintain Service Requests
<input type="checkbox"/> View Settlement Statements	
<b>Asset Owner - GRDA_GEN User Roles:</b> <span style="float: right;">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Entity Relationship Model	<input type="checkbox"/> View Meter Data
<b>Asset Owner - GRDA_LSE User Roles:</b> <span style="float: right;">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Entity Relationship Model	<input type="checkbox"/> View Meter Data
<b>Market Operations Roles:</b> <span style="float: right;">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Maintain Capacity Plans	<input type="checkbox"/> View Maintain Resource Plans
<input type="checkbox"/> View Maintain Capacity Bids	<input type="checkbox"/> View Maintain Energy Imbalance Bids
<input type="checkbox"/> View Operator Notification	<input type="checkbox"/> View Market Clearing Price for Capacity
<input type="checkbox"/> View Capacity Anc. Svc. Obligation	<input type="checkbox"/> View Maintain MP Forecasts
<input type="checkbox"/> View MP Over/Under Commitment	<input type="checkbox"/> Deliverability Analysis
<input type="checkbox"/> View Maintain XML Listener	
Fields in bold are required.	
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	

**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).

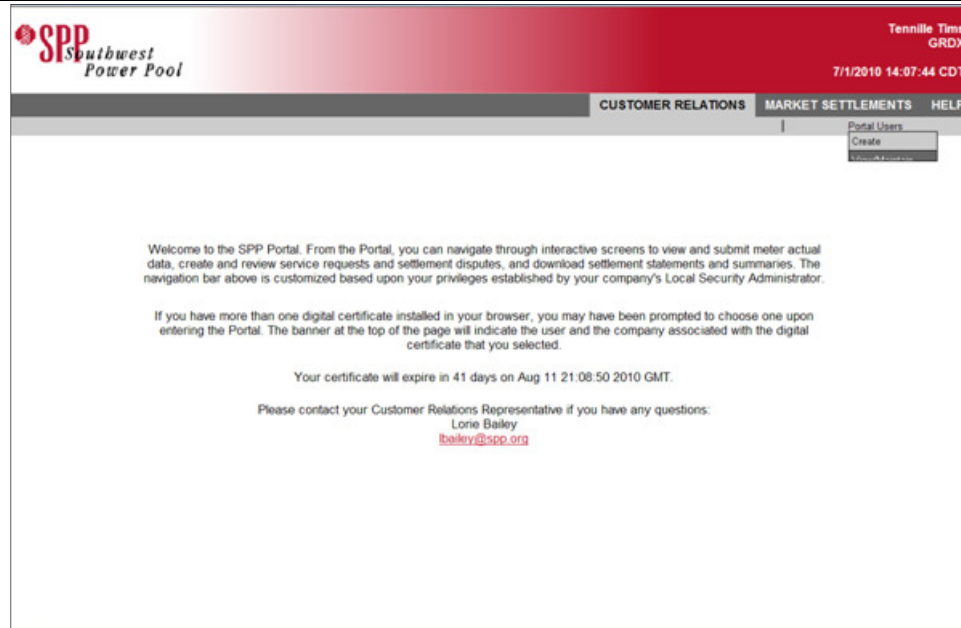


Figure 3.2.1 Accessing the View/Maintain User Page

### 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 Market Participant. (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
<a href="#">celentis Application</a>	<a href="mailto:celentis@grda.com">celentis@grda.com</a>	Active
<a href="#">Generation BCC</a>	<a href="mailto:oper@grda.com">oper@grda.com</a>	Active
<a href="#">Transmission BCC</a>	<a href="mailto:trans@grda.com">trans@grda.com</a>	Active
<a href="#">Doug Callison</a>	<a href="mailto:dcallison@grda.com">dcallison@grda.com</a>	Active
<a href="#">Jeff Carol</a>	<a href="mailto:jcarroll@grda.com">jcarroll@grda.com</a>	Active
<a href="#">Matt Foote</a>	<a href="mailto:mfoote@grda.com">mfoote@grda.com</a>	Active
<a href="#">Errol Goad</a>	<a href="mailto:egoad@grda.com">egoad@grda.com</a>	Active
<a href="#">Richard Gulotta</a>	<a href="mailto:rgulotta@grda.com">rgulotta@grda.com</a>	Active
<a href="#">Ed Hammons</a>	<a href="mailto:ehammons@grda.com">ehammons@grda.com</a>	Active
<a href="#">Tim Hooker</a>	<a href="mailto:thooker@grda.com">thooker@grda.com</a>	Active

1 to 10 of 38 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.

View User Details	
<b>Contact Information</b>	
First Name:	Tennille
Last Name:	Tims
E-mail Address:	<a href="mailto:ttims@spp.org">ttims@spp.org</a>
Work Phone Number:	(501) 688-1651
Additional Phone Number:	
Job Title:	LSA
<b>Authorization Information</b>	
Certificate Serial Number:	4d-c8-63-a7-00-00-00-00-1c-58
Certificate Issuer:	C=US, S=MN, L=Minneapolis, O=Open Access Technology International Inc, CN=OATI WebCARES Issuing CA
User Status:	Active
<b>Roles</b>	
Market Participant - GRAND RIVER DAM AUTHORITY:	
Local Security Administrator	
Asset Owner - GRDA_GEN User Roles:	
no roles assigned	
Asset Owner - GRDA_LSE User Roles:	
no roles assigned	
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.

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

Update User	
<b>Contact Information</b>	
First Name:	Tennie
Last Name:	Tims
Email Address:	tims@spp.org
Work Phone Number:	(800) 662-1651
Additional Phone Number:	
Job Title:	LSA
<b>Authorization Information</b>	
Certificate Serial Number:	40-12-10-07-00-00-00-1c-58
Certificate issuer:	C=US, E=IN, U=Illinois, O=Open Access Technology International Inc, CN=DATI WebCAREB s.sung CA
User Status:	Active
<b>Roles</b>	
Market Participant - GRAND RIVER DAM AUTHORITY User Roles:	
<input type="checkbox"/> View Contacts	<input type="checkbox"/> View Entity Relationship Model
<input type="checkbox"/> User Messages	<input type="checkbox"/> View and Maintain Service Requests
<input type="checkbox"/> View Settlement Statements	
Asset Owner - ORDA_GEN User Roles: <span style="float:right">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Entity Relationship Model	<input type="checkbox"/> View Meter Data
Asset Owner - ORDA_LBE User Roles: <span style="float:right">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Entity Relationship Model	<input type="checkbox"/> View Meter Data
Market Operations Roles: <span style="float:right">Select All <input type="checkbox"/></span>	
<input type="checkbox"/> View Maintain Capacity Plans	<input type="checkbox"/> View Maintain Resource Plans
<input type="checkbox"/> View Maintain Capacity Bids	<input type="checkbox"/> View Maintain Energy Imbalance Bids
<input type="checkbox"/> View Operator Notification	<input type="checkbox"/> View Market Clearing Price for Capacity
<input type="checkbox"/> View Capacity Anc. Svc. Obligation	<input type="checkbox"/> View Maintain IEP Forecasts
<input type="checkbox"/> View IEP Over/Under Commitment	<input type="checkbox"/> Deliverability Analysis
<input type="checkbox"/> View Maintain XML Listener	
Fields in bold are required.	
<input type="button" value="Back"/> <input type="button" value="Submit"/>	

**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.

Update User Confirmation	
<b>Contact Information</b>	
First Name:	Tennille
Last Name:	Tims
E-mail Address:	<a href="mailto:tims@spp.org">tims@spp.org</a>
Work Phone Number:	(501) 888-1651
Additional Phone Number:	
Job Title:	LSA
<b>Authorization Information</b>	
Certificate Serial Number:	4d-c8-83-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
<b>Roles</b>	
<b>Market Participant - GRAND RIVER DAM AUTHORITY User Roles:</b>	
Local Security Administrator	
<b>Asset Owner - GRDA_GEN User Roles:</b>	
no roles assigned	
<b>Asset Owner - GRDA_LSE User Roles:</b>	
no roles assigned	
<b>Market Operations Roles:</b>	
no roles assigned	
Your portal user has been successfully updated. The updated user information is listed above.	
<input type="button" value="Print"/> <input type="button" value="Add New User"/> <input type="button" value="Update"/>	

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 <b>/gse/index</b> .
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 in to the portal, it gets an error.	Ensure that your certificate has been updated in the Portal.