



## Transmission Services

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### Customer Data Entry User's Guide, Version 6

Updated: April 11, 2023

The Customer Data Entry (CDE) is a system provided by BPA that allows a customer to access information pertaining to Ancillary Services, Loss Return obligations, portfolio manager, contract portfolio manager and authorize a third party to view their information and data. Screens may not be available to all customers.

Periodically, BPA's CDE Support Staff may contact a Security Officer (designated via submittal of the CDE System Access form) to confirm Security Officer designations and review the user list.

#### Hardware/Software Requirements

- Access to the Internet
- Microsoft Edge, Google Chrome, and Mozilla Firefox are supported browsers
- Screen resolution of 1024 x 768 or higher is recommended
- Extensible Markup Language (XML). For technical assistance, send an email request to [txcbs@bpa.gov](mailto:txcbs@bpa.gov).

The OATI system screenshots included in this document are proprietary and not to be used outside the context of this document. Do not distribute without specific authorization from OATI.

**Note:** No customer production transactional data is used in the screenshots.

#### CDE System Displays

The CDE system provides customers access to the following displays:

Portfolio Manager: PTP contracts.

Contract Portfolio Management: Customers with multiple-to-multiple reservation configurations may view their Transmission Service Requests, e-Tags, and contract information.

Losses:

- Daily Loss Report: Loss obligations
- Loss Imbalance Report: Over/under returned losses
- Monthly Total Loss Report

Ancillary Services:

- Self Supply OR Integrated Delivery Amounts
- Self Supply OR Obligations

Load Data: Load estimates

Plant Deviations: Generation estimates, generation minimum, generation maximum and hourly unit commitment

Shared Path Summary: Owner/Non-Federal Participant (NFP) shares and scheduled use of the Northern Intertie and Southern Intertie

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## Accessing Customer Data Entry (CDE)

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### System Access Prerequisites

- Complete the [New Customer Application Process for Transmission Service](#) with BPA and be an active Transmission Service customer or an active Generation Interconnection customer, prior to requesting access to the CDE system.
- 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>.
- Hold an active NAESB EIR number (also known as a NERC code) from <https://www.naesbwry.oati.com/NAESBWRY/sys-index.wml>.
- Complete and submit the CDE System Access form via email to BPA's CDE Support Staff at [txcbs@bpa.gov](mailto:txcbs@bpa.gov).

### Initial WebTrans Log On/Location

BPA's CDE Support Staff will send a welcome email to individual users. In addition, users will receive two automated emails from the system, one with their username, and another with their password.

The CDE Support Staff will contact the Customer's Security Officers to provide additional information regarding group logon information. The username and password will be automatically sent by automated emails to the designated email address.

When logging on, the system will validate that the computer being used has the proper WebCares Certificate installed. If the WebCares Certificate does not exist or does not support the logon, access will be denied. Contact your company's System Administrator to get the proper WebCares Certificate.

To access CDE:

1. Open a web browser and navigate to <https://www.bpa.oati.com/bpa/login>.
2. Enter your Username and Password in the appropriate fields and click **Login** to access the system.

### Log On/Password Reset

A logon username cannot be changed once it is established.

Individual or Group user password reset: Click the "Forgot Password" button and follow prompts to reset passwords.

## Third Party CDE Access

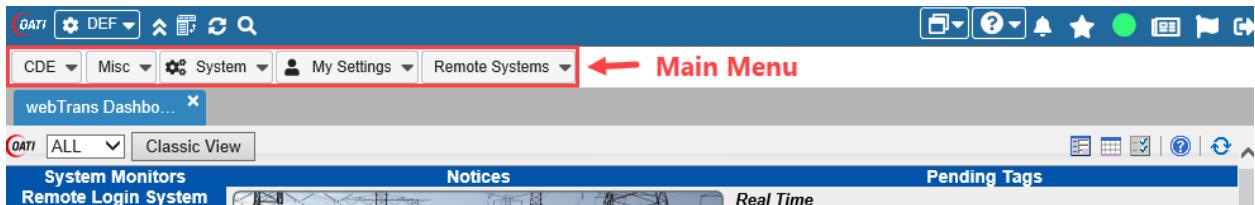
- A CDE Administrative Contact may authorize another Entity, such as a Scheduling Agent or Third Party Loss Provider to see its data and information in the CDE system by identifying the Third Party on the [CDE System Access Form](#).
- The Third Party must have submitted its own [CDE System Access Form](#) and obtained its own access to the CDE system.
- BPA's CDE Support Staff will notify the Security Officers of both the Customer and the Third Party when the Third Party can access the Customer's data.
- 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](#).

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## Navigation

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### Main Menu



Access the following menu items from the Main Menu:

- **CDE** – provides access to the CDE reports. Available options may vary based on user permissions and business need.
- **Misc** – provides access to open the main dashboard and change time zone settings.
- **My Settings** – provides access to set personal settings.
- **Remote Systems** – provides access to additional OATI systems that the user may have access to.













To display the menu options, left click on the menu. The following example shows the menu options for the CDE menu. Menu options are available based on access.



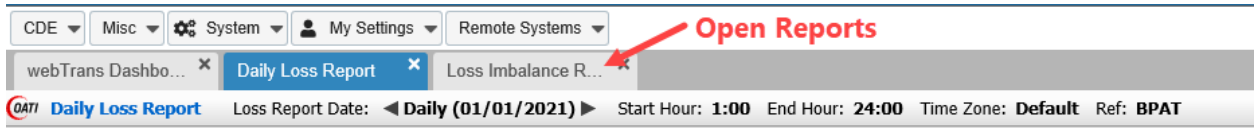
## Standard Icons



These are the standard icons available on all screens:

- |   |                               |   |                                     |
|---|-------------------------------|---|-------------------------------------|
|  | Show/Hide horizontal menu bar |  | Toggle to Vertical Menu Orientation |
|  | Refresh Menu                  |  | Search Menu                         |
|  | Create New Layout             |  | Help                                |
|  | Alarms                        |  | Favorites                           |
|  | Data connection indicator     |  | News Inbox                          |
|  | Email OATI Support            |  | Log out                             |

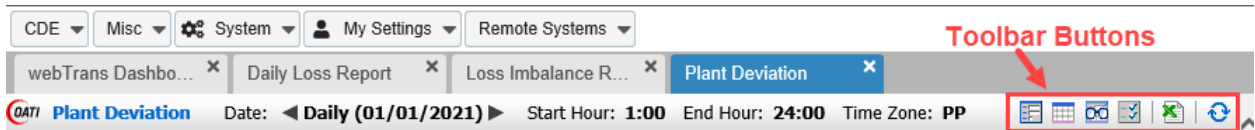
## Navigating Multiple Open Reports









Open reports display as tabs across the webTrans window. To move among the open reports, click the tab to make it the active report. Clicking the tab does not Refresh the screen.

To close the report, click the “X” on the right side of the tab.


## Report Standard Toolbar Buttons

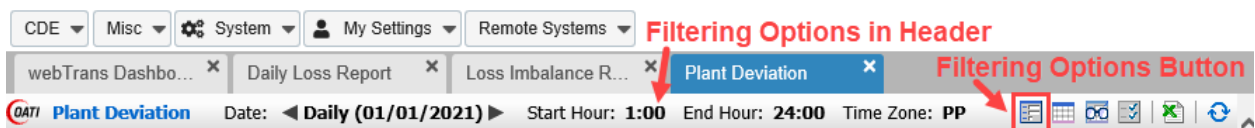


When a report is open, there are standard toolbar buttons located on the right side of the window. Buttons not applicable to a report will be grayed out for that report.

	Filter Options	Opens the filter options for the report.
	Column Configuration	To hide columns and rearrange the order of columns.
	Display Views	To set and save filter options. DO NOT SHARE THE VIEW – the view will be shared with ALL users, not just users within your company container.
	Display Options	To customize the user interface, such as increasing the font size.
	Export to Excel	Exports the report to excel.
	Refresh	Refreshes the screen.

## Filtering Options

To view the Filter Options dialog box, click the Filter Options button  or the filter options in the header of the report.

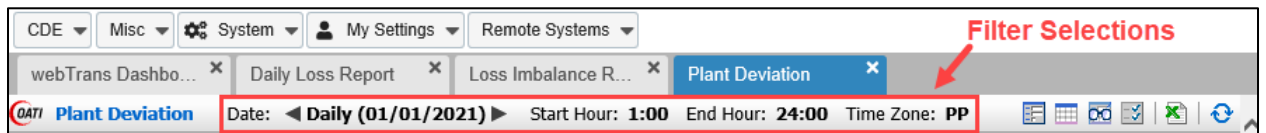


## Filtering Options Dialog Box

Use the filtering options dialog box to select the records to display on the report.

Filter Option	Value	Toggle
Loss Report Date	Daily	Auto
Start Hour	1:00	YES
End Hour	24:00	NO
Time Zone	Default	YES
Contract No		YES
Entity		YES
Type		YES
Ref	BPAT	YES
Financial	<input type="checkbox"/>	YES
Slice	<input type="checkbox"/>	YES
In Kind	<input type="checkbox"/>	YES
Use Archive	<input type="checkbox"/>	YES

- Click the **Show** button to show the filter selections on the header bar.
- Beside each filter option, there is a toggle button that changes each specific filter option. The selections are Auto, Yes, and No.
  - ◆ **Auto** displays the filter option in the header if the filter is being used.
  - ◆ **YES** always displays the filter option even if it is not being used.
  - ◆ **NO** does not display the filter option even if the filter is being used.



- Many of the filter options support multiple selections. To select more than one option, hold down the CTRL button and click on the selections. For a text field, enter a comma between selections.



## Date


Relative dates such as Today, Yesterday, Next day, Next Day +1, and Daily are common on all screens except for the Loss Imbalance screen and Monthly Total Loss Report. The Loss Imbalance screen and the Monthly Total Loss Report have monthly options. When Daily is selected, you will need to select a date from the Calendar.

The screenshot shows a 'Filtering Options' dialog box with the following fields and values:

- Date: Today (dropdown), 01/24/2020 (text), Auto (button)
- Start Hour: Daily (dropdown, selected), Today, Yesterday, Next Day, Next Day + 1 (options)
- End Hour: (dropdown), Auto (button)
- Time Zone: (dropdown), Auto (button)
- Ref. Entity: (dropdown), Auto (button)
- Gen Type: ALL (dropdown), Auto (button)
- Imbalance: ALL (dropdown), Auto (button)
- Generator: ALL (dropdown), Auto (button)
- Contingency: ALL (dropdown), Auto (button)
- Use Archive:  Auto (button)


Buttons: Apply, Reset

## Column Configuration

Click Column Configuration  to customize the columns and the order of the columns that display on the report.

**Note:** When this button is not available for a report, it is grayed out.



 Moves all columns to either Show or Hide. You can hide all columns and then select a few to show or you can move all columns from the Hide to the Show column. To select a few columns, press the CTRL button and select the columns you would like to move.



Moves the selected column to the top. The first column in the list is the first column in the report.



Moves the selected column up one place.



Moves one column to either the Show or Hide field.

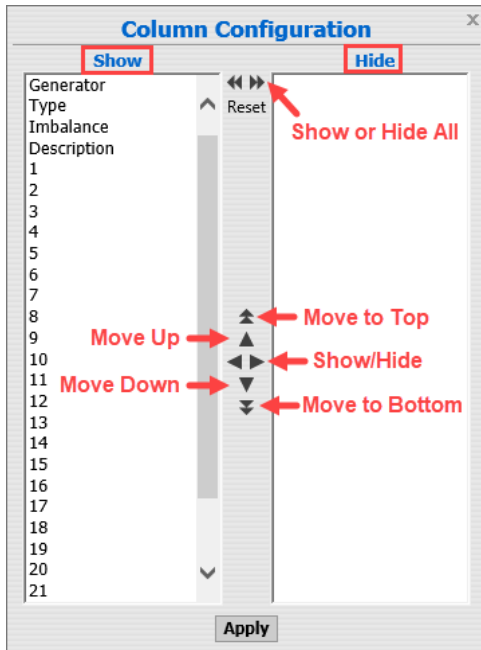


Moves the selected column down one place.




Moves the selected column to the bottom of the list.

**Note:** To return the columns to the default setting, click **Reset**.



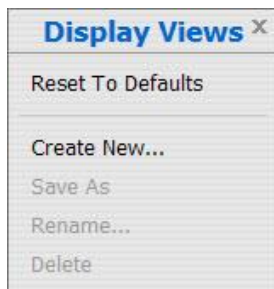
## Display Views

Click  to set filter options and then save these filters as a customized view.

DO NOT SHARE THE VIEW. Sharing a view will allow ALL CDE customers and internal webTrans user to see the view. At this time, BPA is asking customers and internal users not to share a view.

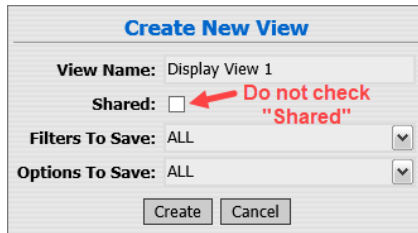
### To create a view

1. Click the **Display View** button.



2. Click **Create New** to display the Create New View dialog box.

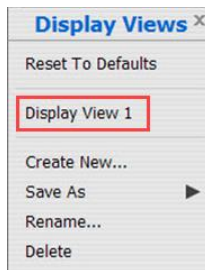
3. Enter the **View Name**.



**Note:** Sharing a view will allow ALL CDE customers and internal webTrans user to see the view. At this time, BPA is asking customers and internal users not to share a view.

4. In the **Filters to Save** field, select either **All** reports or a specific report where you want to use this view.
5. Click **Create**.

This view now appears on the list.




### To Delete a Display View

1. Click the Display View icon.
2. Select the view that you want to delete.
3. Click **Delete**.
4. Click **Delete** again in the Delete View confirmation dialog box.

**Note:** Only the WebCares Certificate/user that created the view can edit or delete a saved view.

### Display Options

Click  to customize the User Interface.


You can customize the following options on your screen.

- Hide/Show Title: Hides or Shows the screen title on the header.
- Increase/Decrease Font Size: Increases or decreases the font size for the report data.
- Disable/Enable Row Coloring: Hides or shows the background row coloring. If the option is not available for the screen, it will be grayed out.

- Enable Auto Refresh is grayed out for all CDE screens. This functionality is not available.
- Disable Initial Display Query: When screens are first opened, they display results from the last query used in the report. If you disable the initial query, you will be prompted to view the initial display or to select new filtering options when you open the report. It will not automatically display the data from the last query.




## Export to Excel

Click  to export the data to Excel. All the data in the report will be exported to Excel and not just the data on the current page.

**Note:** The export is in the csv (comma separated value) format.

## Refresh

Click  to refresh the data in the current report.

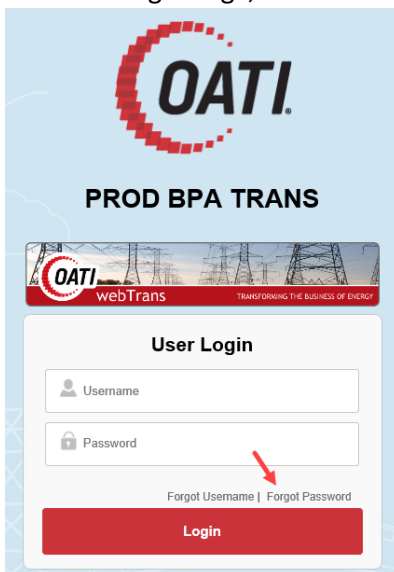
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## Change Password

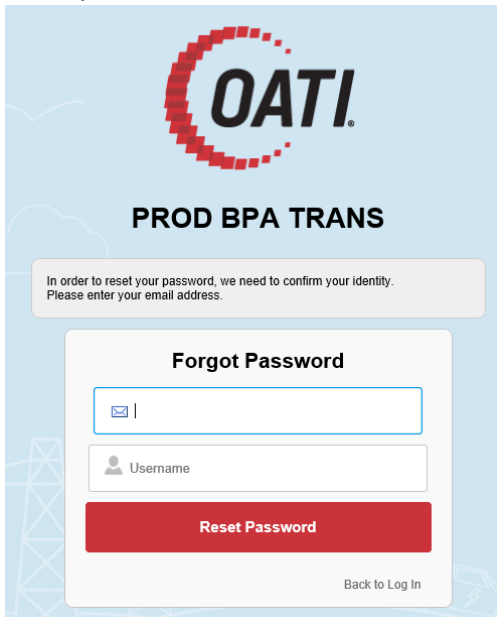
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### Change Password prior to logging-in

1. From the Login Page, select the **Forgot Password** link.

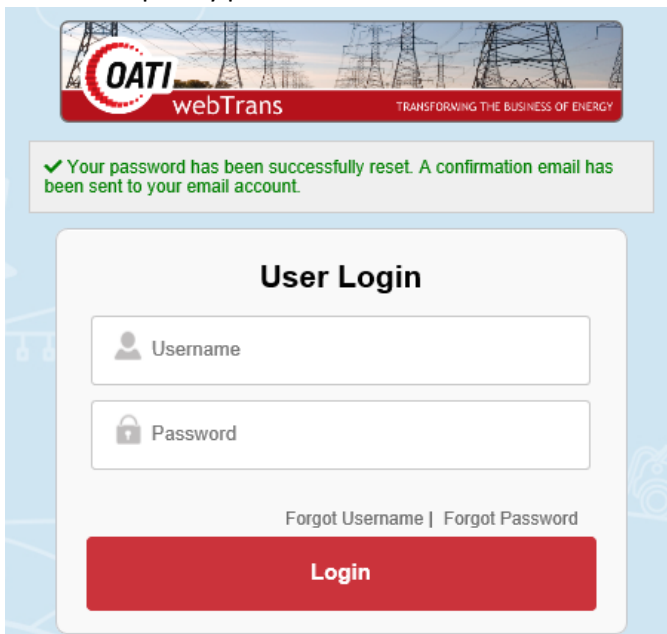


2. Enter your email address associated to the user account and username. Click **Reset Password**.



The screenshot shows the OATI 'Forgot Password' form. At the top is the OATI logo and the text 'PROD BPA TRANS'. Below this is a message box: 'In order to reset your password, we need to confirm your identity. Please enter your email address.' The form itself has a title 'Forgot Password' and contains three input fields: an email field with an envelope icon, a 'Username' field with a person icon, and a red 'Reset Password' button. A 'Back to Log In' link is located at the bottom right of the form.

3. You will see a message stating that the password has been successfully reset. Check your email for the temporary password.



The screenshot shows the OATI 'User Login' form. At the top is a banner with the OATI logo, 'webTrans', and the tagline 'TRANSFORMING THE BUSINESS OF ENERGY'. Below the banner is a green success message: '✓ Your password has been successfully reset. A confirmation email has been sent to your email account.' The form has a title 'User Login' and contains two input fields: 'Username' with a person icon and 'Password' with a lock icon. Below the fields are links for 'Forgot Username' and 'Forgot Password', and a red 'Login' button.

4. Enter your username and temporary password provided in the email. Click **Login**.
5. The **Change Password** screen will appear. Enter the temporary password in the **Current Password** field.
6. Enter the new password in the two remaining fields; **New Password** and **Confirm New Password**.

The Password must meet the following requirements:

- a. Password length: minimum 8 characters and maximum 30 characters.
- b. Must contain all four character types:
  - i. Lower case letters: a-z
  - ii. Upper case letters: A-Z
  - iii. Numbers: 0-9
  - iv. Special characters: `~!@\$%^()\_+=[{};:./<>?
- c. The following special characters cannot be used: space, single quote ('), double quote ("), pound sign (#), asterisk (\*), ampersand (&), and pipe (|).
- d. Must be different from the last 8 passwords.

### Change Password while logged-in

1. From the **My Settings** menu, click **Change Password** to display the screen.

webTrans Dashbo... x Change Password x

**Change Password**

1. Password length: minimum 8 characters and maximum 30 characters.  
 2. Must contain all four character types:  
 Lower case letters: a-z  
 Upper case letters: A-Z  
 Numbers: 0-9  
 Special characters: `~!@\$%^()\_+=[{};:./<>?  
 3. The following special characters cannot be used: space, single quote ('), double quote (\"), pound sign (#), asterisk (\*), ampersand (&), and pipe (|).  
 4. Must be different from the last 8 passwords.

Current Password: \*

New Password: \*

Confirm New Password: \*

2. Enter current password in the **Current Password** field.
3. Enter the new password in the two remaining fields; **New Password** and **Confirm New Password**.


The Password must meet the following requirements:


- a. Password length: minimum 8 characters and maximum 30 characters.
- b. Must contain all four character types:
  - i. Lower case letters: a-z
  - ii. Upper case letters: A-Z
  - iii. Numbers: 0-9

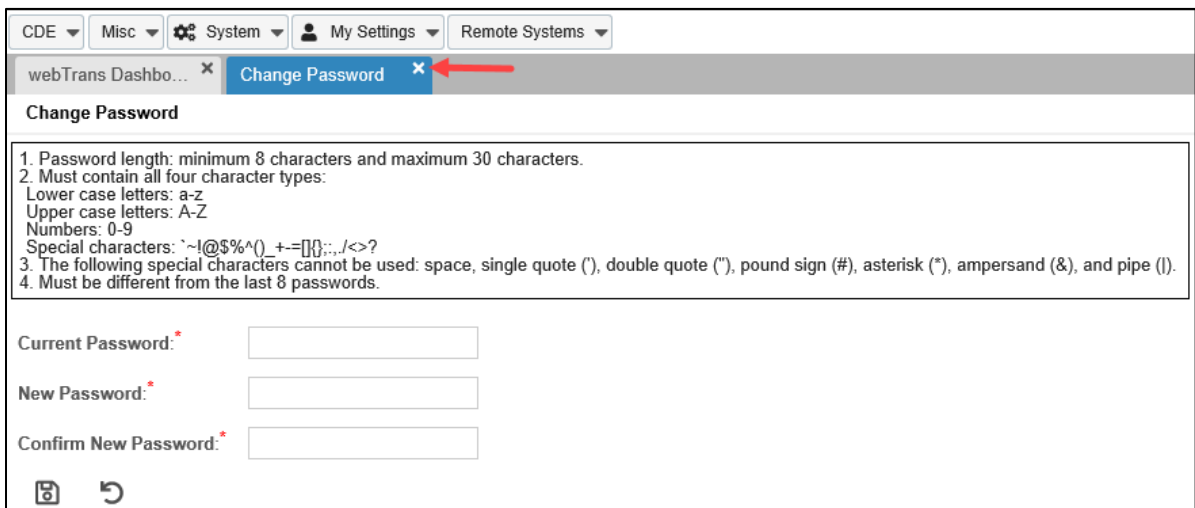
iv. Special characters: `~!@\$%^()\_+=[{};:./<>?

- c. The following special characters cannot be used: space, single quote ('), double quote ("), pound sign (#), asterisk (\*), ampersand (&), and pipe (|).
- d. Must be different from the last 8 passwords.

**Note:** All fields must be filled in before the password will be changed.

4. Click the **Save** icon  at the bottom on the screen to accept the new password.

**Note:** Click the **Reset** icon  to clear the fields on the screen and reenter the passwords. Click the **"X" on the tab** to close the screen without making changes to the current setting.



CDE Misc System My Settings Remote Systems

webTrans Dashbo... x Change Password x



### Change Password

1. Password length: minimum 8 characters and maximum 30 characters.
2. Must contain all four character types:
  - Lower case letters: a-z
  - Upper case letters: A-Z
  - Numbers: 0-9
  - Special characters: `~!@\$%^()\_+=[{};:./<>?
3. The following special characters cannot be used: space, single quote ('), double quote ("), pound sign (#), asterisk (\*), ampersand (&), and pipe (|).
4. Must be different from the last 8 passwords.

Current Password: \*

New Password: \*

Confirm New Password: \*

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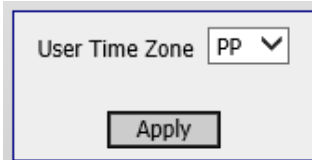
## Change Time Zone

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The time zone is used to display the date in the reports that do not have their own time zone selections. The time zone setting is specific to the user.

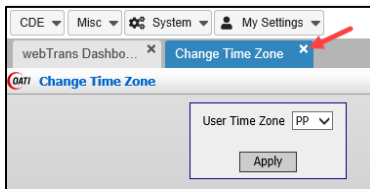
To change the Time Zone:

1. From the **Misc** menu, click **Change Time Zone** to display the following screen:



2. Click the arrow next to **User Time Zone**, and then select the desired Time Zone from the drop-down list.
3. Click **Apply** to accept the change.

**Note:** Click the "X" on the tab to close the screen without changing the current setting.





## Set Alarm Preferences

Use Alarm Preferences to receive notifications that certain conditions have occurred.  
To change the Alarm Preferences:

1. From the **My Settings** menu, click **Alarm Settings** in the drop-down menu to display the following screen:

The screenshot shows the 'Alarm Settings' page with a table of alarm subscriptions. The table has columns for 'Subscribe', 'Alarm Type N...', 'Description', 'Delivery Method', 'Alarm Preview', 'Sound Na...', 'Res...', 'User Email', and 'User'. There are two groups of alarms: 'CDE Alarms' and 'Scheduling Alarms'. The 'CDE Alarms' group includes 'CDE Shared Path Sun', 'Generation Estimates', 'Load Estimates', 'Loss Supply/Obligatic', 'Plant Deviation', 'Transmission Set Asi', and 'TX Owner Rights'. The 'Scheduling Alarms' group includes 'CDE Out of Service'. Each row has a checkbox in the 'Subscribe' column.

Subscribe	Alarm Type N...	Description	Delivery Method	Alarm Preview	Sound Na...	Res...	User Email	User
<b>Group Name : CDE Alarms</b>								
<input type="checkbox"/>	CDE Shared P...	CDE Shared Pat...	Application Head...	CDE Shared Path Sun		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Generation Esti...	Generation Estim...	Application Head...	Generation Estimates		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Load Estimates	Load Estimates	Application Head...	Load Estimates		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Loss Supply/O...	Loss Supply/Obli...	Application Head...	Loss Supply/Obligatic		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Plant Deviation	Plant Deviation	Application Head...	Plant Deviation		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Transmission S...	Transmission Set...	Application Head...	Transmission Set Asi		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	TX Owner Rights	TX Owner Rights	Application Head...	TX Owner Rights		<input type="checkbox"/>	txcbs@bpa...	000-00
<b>Group Name : Scheduling Alarms</b>								
<input type="checkbox"/>	CDE Out of Ser...	CDE Out of Service	Application Head...	CDE Out of Service		<input type="checkbox"/>	txcbs@bpa...	000-00

2. To enable an alarm, select the alarm row and expand the **Alarm Subscription Entry** field.

The screenshot is identical to the previous one, but with red arrows and text annotations. A red arrow points to the first row of the 'CDE Alarms' group with the text 'Select the row'. Another red arrow points to the 'Alarm Subscription Entry' field in the first row with the text 'Expand the Entry field'.

Subscribe	Alarm Type N...	Description	Delivery Method	Alarm Preview	Sound Na...	Res...	User Email	User
<b>Group Name : CDE Alarms</b>								
<input type="checkbox"/>	CDE Shared P...	CDE Shared Pat...	Application Head...	CDE Shared Path Sun		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Generation Esti...	Generation Estim...	Application Head...	Generation Estimates		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Load Estimates	Load Estimates	Application Head...	Load Estimates		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Loss Supply/O...	Loss Supply/Obli...	Application Head...	Loss Supply/Obligatic		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Plant Deviation	Plant Deviation	Application Head...	Plant Deviation		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	Transmission S...	Transmission Set...	Application Head...	Transmission Set Asi		<input type="checkbox"/>	txcbs@bpa...	000-00
<input type="checkbox"/>	TX Owner Rights	TX Owner Rights	Application Head...	TX Owner Rights		<input type="checkbox"/>	txcbs@bpa...	000-00
<b>Group Name : Scheduling Alarms</b>								
<input type="checkbox"/>	CDE Out of Ser...	CDE Out of Service	Application Head...	CDE Out of Service		<input type="checkbox"/>	txcbs@bpa...	000-00

3. Configure the alarm:

- a. Select the **Basic Information** tab if not already selected.
- b. Check the **Subscribe** checkbox.
- c. Check the **Is Priority** checkbox to display triggered alarms in groupings.
- d. Select one or more **Delivery Method**.

Check All	All of the delivery methods will be selected. A <b>Sound Name</b> selection and <b>User Email</b> will be required.
Application Header	The alarm will cause the bell icon in the upper-right of the screen to show the number alarms triggered. A <b>Sound Name</b> selection is required for this delivery method.
Email	An email will be sent to the indicated email address. The <b>User Email</b> field is required for this delivery method.
Envelope Tray	The alarm will display in the lower-right hand corner of the screen.
Popup	The alarm will display in a separate pop-up window within webTrans. Each alarm will display in a separate pop-up window.
Text Message	A text message will be sent to the indicated phone number.

- e. Fill out the **Alarm Subject** field.
- f. Select the **Background Color** and **Text Color** when applicable.
- g. Enter a **Description** if needed.
- h. Enter **User Details** when applicable depending on the **Delivery Method** selected.
- i. Select a **Sound Name**. This field is required if the **Delivery Method** of **Application Header** is selected.
- j. Select the **Extension Information** tab.
- k. Select the **Real Time** and/or **Day Ahead** checkboxes. At least one of the checkboxes must be marked in order for the alarm to trigger.
  - a. **Real Time** – The alarm is triggered if the TSR or Tag is in the Real-Time horizon.
  - b. **Day Ahead** – The alarm is triggered if the TSR or Tag is in the Day-Ahead horizon.
- l. Click the **Save** icon on the bottom left hand corner of the **Alarm Subscription Entry** field.

## To Deactivate an Alarm

1. Select the alarm row and expand the **Alarm Subscription Entry** field.
2. Select the **Basic Information** tab if not already selected.
3. Uncheck the **Subscribe** checkbox.
4. Click the **Save** icon at the bottom left hand corner of the **Alarm Subscription Entry** field.

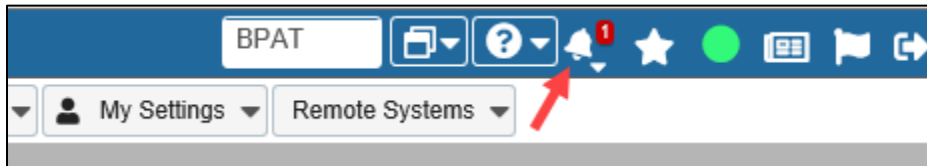
---

## Clearing Alarm Conditions

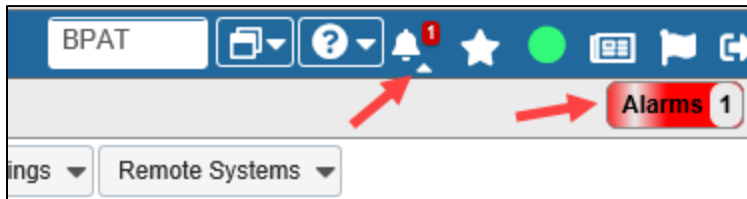
---

The process for clearing an alarm condition depends on the type of alarm.

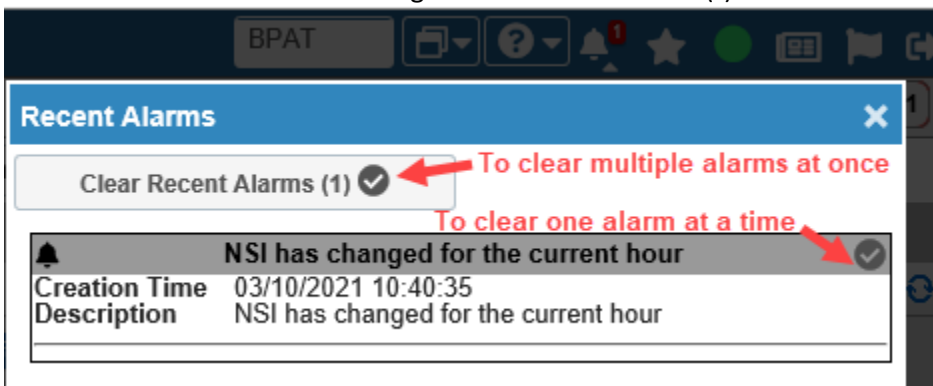
1. Application Header
  - a. Click on the bell icon to display the alarm(s).



- b. Users can also click on the arrow below the bell icon to display the alarm groupings and then click on the alarm grouping to display the alarm(s).



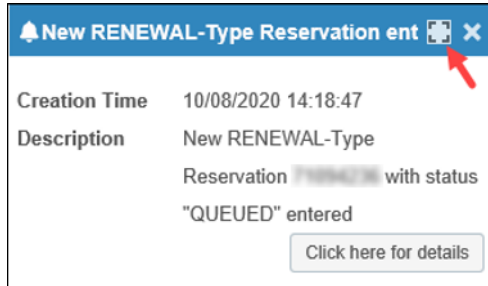
- c. Click the checkmark to acknowledge and dismiss the alarm(s).



2. Email
  - a. Review the email and delete or save.

3. Envelope Tray

- a. Review each alarm.
- b. NOTE: This display type automatically causes the alarm to be acknowledged and the message will disappear without user interaction. To retain the message window, click on the square box next to the X.



4. Popup

- a. Review each popup screen and dismiss each screen.


5. Text Message

- a. Review the text and delete or save.

---

## Log Out Menu Option

---

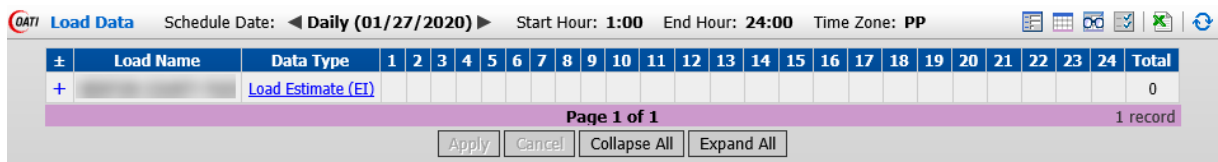
To close the current CDE session, click the **Log Out** icon  and confirm log out.

---

## Load Data – Energy Imbalance Service (EI)

---

Use this option to enter load estimates, paybacks for over and under estimation of load, and self supply amounts for a selected Load Name.



### Expand/Collapse

- Use the Expand/Collapse column to expand the view for the load.
- Click the + in the Expand/Collapse column to expand the view for the load entity. In Expand mode, all information associated with the Load Entity displays.

- Click the - in the Expand/Collapse column to collapse the view for the load entity. In Collapse mode, the only information displayed is the Load Estimate for each of the Load Entities listed.

**Note:** Click Expand All to expand the view for all generators on the screen. Click Collapse All to Collapse the view for all expanded views.

±	Load Name	Data Type	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
-		<a href="#">Load Estimate (EI)</a>																
		Transmission Schedules																
		<a href="#">Payback for Over Estimation of Load (+)</a>																
		<a href="#">Payback for Under Estimation of Load (-)</a>																
		<a href="#">EI Self Provide</a>																

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### Load Name (Entity) Values

In Expand mode, the following information displays for each Load Entity:

<b>Load Estimate (EI)</b>	The hourly values of the estimated loads for the day selected. This value can be updated prior to the hour only. If no value is entered, an alarm is created to indicate that load data is needed.
<b>Transmission Schedules</b>	The hourly aggregation of the transmission tags (Scheduled Load) that the load entity has produced. If you have detail access, a link displays. Click the link to display a list of all the tags that comprise the aggregation. Each tag is a link that you can click to open and view the tag detail.
<b>Payback for Over Estimation of Load (+)</b>	The hourly value that the Load Entity wants to pay back to keep its Load Estimate within its limit to avoid potential Energy Imbalance charges. The value is limited to the greater of 1.5% of the Scheduled load or +/- 2 MW.
<b>Payback for Under Estimation of Load (-)</b>	The hourly value that the Load Entity wants to pay back to keep its Load Estimate within its limit to avoid potential Energy Imbalance charges. The value is limited to the greater of 1.5% of the Scheduled load or +/- 2 MW.
<b>EI Self Provide</b>	The hourly value of the amount that the Load Entity wants to Self Provide to keep its Load Estimate within its limit to avoid potential Energy Imbalance charges. The value is limited to the greater of 6% of the Scheduled Load or 2 MW. Select the EI Self Provide link to display the field to enter the limits for the Self Provide.

## Entering the Load Estimate

To enter Load Estimate data for the selected resource:

1. Use the filter box at the top of the screen to define the information to display, and then click **Apply**.

---

**Schedule Date** Selects the date to view. Enter the date or use the links to the right of the date.

---

**Start Hour** Selects which hours display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24.

---

**Time Zone** Selects the time zone to use when displaying the data.

---

**Load Name** Selects the load that the entity is servicing.

2. Click the blue Load Estimate (EI) link for the desired Load Name to display the following screen:

3. Enter the data into the appropriate fields for each hour.

**Note:** There are timing constraints that dictate when load data values can be entered. When the field background is gray, the cell is locked and cannot be updated. If the field background is white, the field can be updated.

4. Click **Apply** to save the values.
5. If you have Payback information for over and under estimation or EI Self Provide information, click the link and enter the data.
6. Repeat steps 1 through 5 for each link associated with the load.

**Note:** You can enter Payback and Self Provide data based on a percentage of the load estimate. Hover over the field to display the limit that can be entered.

## Plant Deviation – Generation Imbalance Service (GI)

Use the Plant Deviation screen to manage the generators for the plants that you own or schedule for. This screen is the central point for managing each plant’s generation. If there is a plant deviation, the row will be highlighted in pink. A plant deviation is where the generation estimate plus paybacks does not equal the sum of the schedules associated with the generator.

±	Generator	Type	Imbalance	Description	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Total
+		IPP	Yes	Deviation	-1	-1					-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-1	-11	

### Expand/Collapse

- Click the + in the Expand/Collapse column to expand the view for the generator. In Expand mode all information associated with the generator displays.
- Click the - in the Expand/Collapse column to collapse the view for the generator. In Collapse mode, the only information displayed is the Generation Deviation, if there is one.

**Note:** Click Expand All to expand the view for all generators on the screen. Click Collapse All to collapse the view for all expanded views.

±	Generator	Type	Imbalance	Description	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Total
-		IPP	Yes	Deviation																								0	
				Transmission Schedules	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-240
				Payback for Over Generation (+)																								0	
				Payback for Under Generation (-)																								0	
				Adjusted Schedule Amount	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-240	
				Generation Estimate	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	240	
				Minimum Generation	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	240	

### Generation Estimate Values

In Expand mode, the following information displays for each generator:

- Transmission Schedules** The sum of transmission schedules associated with the generator. The value is the total amount of the tags for which you are responsible. If you have detail access, a link displays. Click the link to display a list of all the tags that comprise the aggregation. Each tag is a link that you can click to open and view the tag detail.
- Generation Estimate** The hourly values of the estimated generation for the day selected. This value can be updated prior to the hour only. If no value is entered, an alarm is created to indicate that generation data is needed.

<b>Payback for Over Generation (+)</b>	The hourly value of the amount that the Generator wants to pay back to keep its Generation Estimate within its limit to avoid potential Generation Imbalance charges. The value that you can enter is limited to the greater of 1.5% of the Generator Estimate or +/- 2 MW. Hover over the Payback field to show the limits for the payback amount.
<b>Payback for Under Generation (-)</b>	The hourly value of the amount that the Generator wants to payback to keep its Generation Estimate within its limit to avoid potential Generation Imbalance charges. The value is limited to the greater of 1.5% of the Generator Estimate or +/- 2 MW. Hover over the Payback field to show the limits for the payback amount.

### Entering Generation Estimates

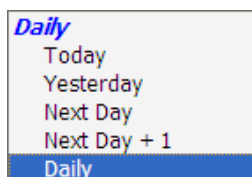
To enter Generation Estimate data for the selected resource:

1. Use query filters at the top of the screen to define the information that will be displayed on the screen.

The available filters are:

**Date** Sets the date for the query.

Enter the date or click the arrow to display the following list of options:



**Start Hour/ End Hour** Selects which hours display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24.

**Time Zone** Defines the time zone in which to display the data.



<b>Ref. Entity</b>	Selects only data that is specific to a customer.
<b>Gen. Type</b>	Restricts the displayed data to a particular type of generator. Available options are: ALL, IPP, Resource, and Federal.
<b>Imbalance</b>	Selects those generators that are or are not subject to imbalance charges. Available options are: ALL, Yes, or No.
<b>Generator</b>	Displays a specific generator's data. Click the arrow and select from the list of generators that are part of your responsibility.
<b>Contingency</b>	Selects only those generators that have an associated contingency during the selected period. Click the arrow and select from the drop-down list. Options are All, Yes, and No.

- When the filters are set, click **Apply** to begin the selection of the appropriate generation information.
- Click the link for the desired Generator to display the Plant Actuals screen.

**Plant Actuals**

Generator	Type	Imbalance		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Total
	IPP	Yes	Generation Estimate	7	9	10	16	12	18	19	11	13	16	24	17	40	40	70	70	70	70	70	70	70	70	70	70	952
			Abs Val Adj Sched Amount	7	9	10	16	12	18	19	11	13	16	24	17	40	40	70	70	70	70	70	70	70	70	70	70	952
			Generation Actual	3	8	8	12	19	13	10	17	14	16														120	
			Station Service Actual																								0	
			Contingency Flag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	

Page 1 of 1 1 record

- Click on the Generation Estimate link to enter the data for each hour.

**Plant Deviation** Date: Daily (01/01/2020) Start Hour: 1:00 End Hour: 24:00 Time Zone: PP Gen Type: IPP

±	Generator	Type	Imbalance	Description	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
-		IPP	Yes	Deviation																		
				<a href="#">Payback for Over Generation (+)</a>																		
				<a href="#">Payback for Under Generation (-)</a>																		
				Adjusted Schedule Amount																		
				<a href="#">Generation Estimate</a>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				<a href="#">Minimum Generation</a>																		

Page 1 of 1 1 record

Apply Cancel Collapse All Expand All

- Click **Apply** to save the values to the system.

**Note:** There are timing constraints that dictate when generation data values can be entered. When the field background is gray, the cell is locked and cannot be updated. If the field background is white, the field can be updated.

- If you have Payback information for over and under estimation, click the link and enter the data.
- Repeat steps 1 through 6 for the other links associated with the generator.

**Note:** You can enter Payback for Generation Imbalance accounting within deviation band 1. Hover over the field to display the limit that can be entered.

### Minimum Generation

A minimum generation level and maximum ramp rate of oversupply management shall be established for all non-VER generators with 3MW or greater nameplate generating capacity in BPA's BAA. If no minimum generation level is established, BPA will assume minimum generation level is zero.

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## Self Supply Operating Reserve Integrated Delivery Amounts for Non-BPA Suppliers

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This report shows amounts of Energy that have been supplied by non-BPA Operating Reserve suppliers to cover the loss of generation by a generator in the BPA balancing authority area, or when BPA is called on by other BA's to supply energy per the NWPP Reserve Sharing Agreement. A non-BPA supplier can be either a self-supplier or a third party supplier.

### Selection Filters

The initial screen displays the last query performed unless *Disable Initial Display Query* option has been previously set. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.

The screenshot shows a 'Filtering Options' dialog box with the following fields and values:

Field	Value	Default/Action
Date	Daily	Auto
	01/01/2020	Auto
Tz	PP	Auto
Reserve Supplier	ALL	Auto
Type	Both	Auto
Start	1:00	Auto
End	24:00	Auto
Use Archive	<input type="checkbox"/>	Auto

Buttons: Apply, Reset

The available filters are:

<b>Date</b>	Selects the date to view.
<b>Tz</b>	Selects the time zone to use when displaying the data.
<b>Reserve Supplier</b>	Selects the specific Supplier to view.
<b>Type</b>	Selects the type of reserves to view. Available options are: CAR, NWPP reserve amounts, or both. CAR is Control Area Reserves.
<b>Start &amp; End</b>	Selects which hours display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24.

### The Operating Reserves Integrated Delivery Amounts Screen

Reserve	Type	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Total
	NWPP																									0
Total In	NWPP																									0
Total Out	NWPP																									0
	CAR																									0
Total NWPP	CAR																									0
Total In	CAR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Out	CAR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

7 records

The report screen displays the data that meets the filter criterion. The amounts displayed are the amounts identified by the tags that were created to deliver the necessary energy to cover the loss by the generator or NWPP reserve sharing.

To view tag detail for the hour, click the amount in the hour for the selected customer. For example, clicking the amount in hour ending 19 under CAR reserves would open a new window that would display the tag approved by the customer to return that amount of energy to cover the loss of generation declared by the generator.

Supplier	Schedule Name	MW
		-5
		-2
		-25
<b>Total</b>		<b>-32</b>

Page 1 of 1    3 records

Close

Click a schedule link in the list to display the schedule information.

Description

Schedule Name:       Date: 01/21/2020 (PPT)      Reference: BPAT

---

Type: Import; Energy      Source CA:       Source Gen:       CPSE:       Path:

SubType:       Sink CA:       Load Entity:       Contract:       OASIS:

Tag Path	Tag Transaction Path							
	CA	TP	MO	PSE	Product	Path	OASIS #	Contract
Interfaces					G			
Graph					7-F			
Profile	BPAT	BPAT						
Show All	BPAT				L			

---

## Self Supply Operating Reserve Obligation for Non-BPA Suppliers

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Use this report for a real time view of your hourly Operating Reserve obligation. You can drill down into the data to see which tags and estimates make up the reserve obligation.

### Selection Filters

The initial screen displays the last query performed unless *Disable Initial Display Query* option has been previously set. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.

Filtering Options X

[Show](#)

**Date:** Daily      ▼ 01/01/2020 📅      Auto

**TZ:** PP      ▼      Auto

**Obligated Entity:** ALL      ▼      Auto

**Start Hour:** 1:00      ▼      Auto

**End Hour:** 24:00      ▼      Auto

**Set-Aside Required:**       Auto

Apply
Reset

The available filters are:

<b>Date</b>	Selects the date to view. Enter the date in the field or use the links to the right of the date.
<b>TZ</b>	Selects the time zone to use when displaying the data.
<b>Obligated Entity</b>	Selects the specific entity to view. Click the arrow and select the entity from the drop-down list.
<b>Start &amp; End</b>	Selects which hours display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24.
<b>Set Aside Required</b>	Limits the display to only those entities in which a set-aside is required. Check the box to apply the limit.

### The Ancillary Reserve Obligation Report Screen

#	Obligated Entity	Set Aside Required	Detail	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Total
		No	Obligation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

The report screen displays the data that meets the filter criterion. Only the data which you have permission to view will display. If you have detail privileges, you will be able to view the tags associated with the calculation of the company’s Operating Reserve (OR) Obligation. Third party self suppliers will automatically have detail view privileges to their customer’s OR obligations and have the ability to view the tags associated with the calculation of the company’s OR obligation.

To view the detail for the hour, click the link for the hour.

Tag/Generator	PSE	MW Type	Gen MW	Load MW
		Credit	-.270	.000
		Credit	-.930	.000
		Credit	.000	.000

Page 1 of 2 31 records

Close

The columns in the detail report are:

---

<b>Tag/Generator</b>	Tag name or source name for the amount that applies to the operating reserve obligation.
<b>PSE</b>	Entity that is responsible for the operating reserve obligation.
<b>MW Type</b>	Source of the data is shown in this column.
<b>Gen MW</b>	The amount that determines the reserve obligation due to generation in BPA's BAA. The reserve obligation is 3% of the total Gen MW.
<b>Load MW</b>	The amount that determines the reserve obligation in BPA's BAA. The reserve obligation is 3% of the total Load MW.

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## Daily Loss Report

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Use this report to display the loss obligation your company has incurred for each hour.

There are three loss return types:

For **Financial** loss return type, the customer agrees to settle its losses financially. This process occurs at the beginning of the following month, when financial losses are calculated for the previous month.

For **In-Kind** loss return type, the customer agrees to return losses via a tag for the amount determined. These losses are calculated 168 hours after transmission service is provided.

For **Slice** loss return type, the customer agrees to use its Slice capacity to cover its losses. These losses are calculated 168 hours after transmission service is provided.

### Selection Filters

The initial screen displays the data based on the filter criteria selected in the Daily Loss Report. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.

The screenshot shows a 'Filtering Options' dialog box with the following fields and controls:

- Loss Report Date:** Daily (dropdown), 01/01/2020 (calendar icon), Auto (button)
- Start Hour:** 1:00 (dropdown), Auto (button)
- End Hour:** 24:00 (dropdown), Auto (button)
- Time Zone:** PP (dropdown), Auto (button)
- Contract No:** (dropdown), Auto (button)
- Entity:** (dropdown), Auto (button)
- Type:** (dropdown), Auto (button)
- Ref:** BPAT (dropdown), Auto (button)
- Financial:**  Auto (button)
- Slice:**  Auto (button)
- In Kind:**  Auto (button)
- Use Archive:**  Auto (button)

At the bottom of the dialog are two buttons: **Apply** and **Reset**.

The available filters are:

<b>Loss Report Date</b>	Selects the date to view. Click the arrow and select from the drop-down list. Select Daily to enter a specific date. If you set the date to Today, Tomorrow, or Yesterday, the date will automatically set to the appropriate date each time you open the Daily Loss Report.
<b>Start Hour End Hour</b>	Selects which hours display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24. To display carried forward values, selection must include a Start Hour of 1.
<b>Time Zone</b>	Selects the time zone to use when displaying the data. To properly display loss data for either Pacific Daylight Saving or Pacific Standard Time, use PP (Pacific Prevailing) time zone.
<b>Contract No.</b>	Selects the contract for which you would like to see loss calculations. Click the arrow and select the contract from the drop-down list.
<b>Entity</b>	Selects the specific entity to view. Click the arrow and select the entity from the drop-down list.
<b>Type</b>	Selects the type of contract for which losses are calculated. Options with losses are: FPT, GF, IR, NT, or PTP.
<b>Ref</b>	Always set to BPAT.
<b>Financial In-Kind, Slice,</b>	Restrict the three types of losses displayed. Check the box(es) for the types of losses to view. To include all types in the report, do not check any of the boxes.

### Expand/Collapse

Click the + in the Expand/Collapse column to expand the view for the contract. In Expand mode, all information associated with the contract displays.

Click the - in Expand/Collapse column to collapse the view for the contract. In Collapse mode, the only information displayed is the imbalance that exists for the contract.

**Note:** Click Expand All to expand the view for all contracts on the screen. Click Collapse All to Collapse the view for all expanded views.



## The Daily Loss Report Screen

The screen displays all the calculations that are associated with schedules that make up the losses.

Contract		Entity	Type	Return Type	Daily Loss Report (01/23/2020) for Transmission Schedules on (01/16/2020)																								Total	
					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24		
			PTP	In-Kind	Carry-Forward	0.937	0.937	0.937	0.937	0.937	0.937	0.937	0.937	0.937	0.956	0.994	0.032	0.070	0.108	0.146	0.184	0.203	0.203	0.203	0.203	0.203	0.203	0.203	0.203	0.266
					Obligation	0	0	0	0	0	0	0	0	0	0.019	0.038	0.038	0.038	0.038	0.038	0.038	0.019	0	0	0	0	0	0	0	0
					Adjustment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
					Total Obligation	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
					Recalculated Delta	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
					Return	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1
					Deviation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
					Imbalance																									

The screen displays all the calculations associated with the schedules that make up the losses.

**Carry Forward** The amount of energy over the whole megawatt value from the calculation in the prior hour. This value is carried to the following hour and added to the obligation that is calculated for that hour. When one full megawatt is accumulated, the megawatt is added to the Total Obligation.

**Obligation** Calculation for the hour down to the kilowatt for transmission service provided 168 hours earlier. This value may be presented as a link to the schedules and/or other data contributing to the loss obligation.

**Adjustment** The adjustments applied to the hour. Adjustments may include carried forward values for after-the-fact loss reconciliations, or other adjustments to loss calculations as mutually agreed to with the customer.

**Total Obligation** Sum of the Carry Forward, Obligation for the hour, and Adjustment. The value of the obligation for the hour is the whole megawatt value. The remainder becomes the carry over for the next hour.

**Recalculated Delta** Amount of change in the loss calculation due to changes in data since the previous loss calculation. This value is the difference in losses associated with the data change. Positive values are an additional loss obligation; negative values are over returned losses.

**Return** Amount of energy returned to BPAT based on the method selected. If the customer returns its losses In-Kind, this value may be presented as a link to view the tag(s) that were generated to cover the loss for the hour.

**Deviation** Differences that exist between the Total Obligation amount and the Return amount.

**Imbalance** Amount of energy that the customer has not returned to date. The value is the result of the difference between the Total Obligation and the Return amounts, plus any Adjustments or Recalculated Deltas after the initial loss calculation.

---

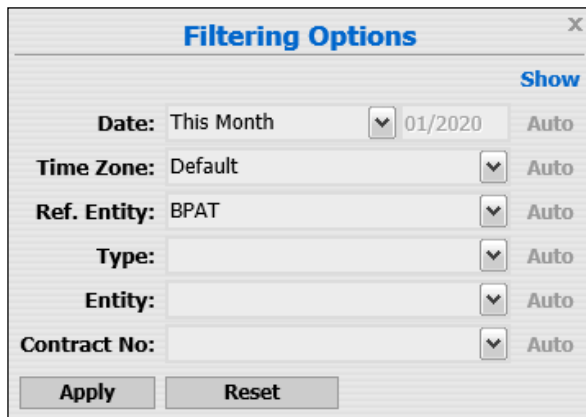
## Loss Imbalance Report

---

This report provides a summary view of loss imbalances that exist for the selected dates.

### Selection Filters

The initial screen displays the data based on the filter criteria selected in the Loss Imbalance Report. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.



The available filters are:

<b>Date</b>	Selects the month to view.
<b>Time Zone</b>	Selects the time zone to use when displaying the data. To properly display loss data for either Pacific Daylight Saving or Pacific Standard Time, use PP (Pacific Prevailing) time zone.
<b>Ref</b>	Always set to BPAT.
<b>Type</b>	Selects the type of contract for which losses are calculated. Options with losses are: FPT, GF, IR, NT, or PTP.
<b>Entity</b>	Selects the specific entity to view. Click the arrow and select the entity from the drop-down list.
<b>Contract No.</b>	Selects the contract for which you would like to see loss calculations. Click the arrow and select the contract from the drop-down list.

## The Loss Imbalance Report Screen

GATI Loss Imbalance Report									
		Date: ◀ Monthly (01/2020) ▶			Time Zone: PP		Ref. Entity: BPAT		
Provider	Contract	Entity	Type	Return Type	01/01/2020	01/02/2020	01/03/2020	01/04/2020	01/05/2020
BPAT			PTP	In-Kind			<a href="#">890.000</a>		

To view the detail that applies to an imbalance, click the link. The link will take you to the Daily Loss Report for the selected imbalance. Note that using a link on this screen to go to the Daily Loss Report may change your filter on the Daily Loss Report.

---

## Monthly Total Loss Report

---

Use this report to display the total loss obligation calculated for your company for days within a month. Display also includes Total Adjustments and Total Returns. Losses designated with the return type In-Kind or Slice are calculated 168 hours after transmission service is provided. Losses designated to be returned Financially are calculated at the beginning of the following month.

### Selection Filters

The initial screen displays the data based on the filter criteria selected in the Monthly Total Loss Report. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.

**Filtering Options**
✕

[Show](#)

Report Month:	This Month	▼	01/2020	Auto
Start Day:	1	▼		Auto
Stop Day:	30	▼		Auto
Time Zone:	PP	▼		Auto
Contract No:		▼		Auto
Entity:		▼		Auto
Type:		▼		Auto
Ref:	BPAT	▼		Auto
Financial:	<input type="checkbox"/>			Auto
Slice:	<input type="checkbox"/>			Auto
In-Kind:	<input type="checkbox"/>			Auto

Apply
Reset

The available filters are:

<b>Report Month</b>	Selects the month to view. Click the arrow and select from the drop-down list. Select Monthly to enter a specific month. If you select This Month, Last Month, or Next Month, the month will automatically set to the appropriate month each time you open the Monthly Total Loss Report.
<b>Start Day Stop Day</b>	Selects which days of the month to display. Start and Stop Days automatically default to first and last days of selected month. Click the arrow next to each field to select another day. Specify as few as one day in the month.
<b>Time Zone</b>	Selects the time zone to use when displaying the data. To properly display loss data for either Pacific Daylight Saving or Pacific Standard Time, use PP (Pacific Prevailing) time zone.
<b>Contract No.</b>	Selects the contract for which you would like to see loss calculations. Click the arrow and select the contract from the drop-down list.
<b>Entity</b>	Selects the specific entity to view. Click the arrow and select the entity from the drop-down list.
<b>Type</b>	Selects the type of contract for which losses are calculated. Options with losses are: FPT, GF, IR, NT, or PTP.
<b>Ref</b>	Always set to BPAT.
<b>Financial Slice, In- Kind</b>	Restrict the three types of losses displayed. Check the box(es) for the types of losses to view. To include all types in the report, do not check any of the boxes. Multiple records may appear in the Monthly Total Loss Report if losses were calculated and returned using multiple methods.

### Expand/Collapse

Click the + in the Expand/Collapse column to expand the view for the contract. In Expand mode, all information associated with the contract displays.

Click the - in Expand/Collapse column to collapse the view for the contract. In Collapse mode, the only information displayed is the imbalance that exists for the contract.

**Note:** Click Expand All to expand the view for all contracts on the screen. Click Collapse All to Collapse the view for all expanded views.

## The Monthly Total Loss Report Screen

The screen displays Daily Loss Report totals for selected day(s) and for the month.

Monthly Loss Report (01/2020) for Transmission Schedules																												
Contract	Entity	Type	Return Type	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	
-		PTP	In-Kind																									
Total Obligation				293	280	294	295	287	332	354	186	283	329	316	187	295	286	328	342	241	254	200	196	187	202	324	317	
Total Adjustment				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Return				293	280	294	295	287	332	354	186	283	329	316	187	295	286	328	342	241	254	200	196	187	202	324	317	

Expand All Collapse All

The screen displays day total and month total loss data.

---

**Total Obligation** Total of the Total Obligations for each day of the month selected. The Total Obligation value may be presented as a link to the associated Daily Loss Report.

---

**Total Adjustment** Total of the adjustments applied for each day of the month selected.

---

**Total Return** Total of energy returned for each day of the month selected.

---

## Shared Path Summary

This report shows your company's share of each of the paths for which there is part ownership and the utilization of the share. Only customers with an ownership share have access to this report. During the current operating and future hours, Shared Path Summary and its Contributing Schedules pages display the values at the end of hour. For past hours, Shared Path Summary and its Contributing Schedules pages display the integrated values for the hour.

**Filtering Options** X

---

**Show**

**Schedule Date:** This Hour & Next Ho Auto

**Start Hour:** 1:00 NO

**End Hour:** 24:00 NO

**Time Zone:** Default NO

**Ref. Entity:** BPAT Auto

**Path:** ALL Auto

**Owner:** Auto

**Limit Usage:** ALL Auto

**Limit Totals:** ALL Auto

**Counter-schedule in Nets:**  Auto

**SubInterval:** 15 NO

Apply
Reset

## Selection Filters

The initial screen displays the last query performed unless *Disable Initial Display Query* option has been previously set. To view other data, change the query filters at the top of the screen. Set the filters and then click **Apply** to display the report.

<b>Schedule Date</b>	Selects the date to view. Enter the date or click the arrow and select from the drop-down list. If you set the date to Today or Yesterday, the date will automatically set to the appropriate date each time you open the Shared Path Summary.
<b>Start Hour</b> <b>End Hour</b>	Selects which hours to display. Click the arrow next to each field and select the hour. Specify as few as one hour in the day or as many as 24.
<b>Time Zone</b>	Selects the time zone to use when displaying the data.
<b>Ref. Entity</b>	Always set to BPAT.
<b>Path</b>	Selects a specific path to display.
<b>Owner</b>	Selects a specific owner to display. Enter the name of the owner in this field.
<b>Limit Usage</b>	Specifies what information will appear on the report for each path share.
<b>Limit Totals</b>	Specifies what totals will appear on the report for each path share.
<b>Counter-schedule in Nets</b>	If selected, a counter e-tag will be included in the Net Schedules row.
<b>SubInterval</b>	Ability to view specific time increments when the time filter is set to "This Hour and Next" The time increments are 5, 10, 15, 20, 30, and 60.

## Shared Path Summary Report Screen

Path		Owner	Limit Usage	15															16										Day Total
				5	10	15	20	25	30	35	40	45	50	55	00	5	10	15	20	25	30	35	40	45	50	55	00		
AC_N>S	<b>Totals</b>	<b>Total Capacity</b>		4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	4800	115200	
		Capacity Share		100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	2400	
		Schedules+Pending		29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	696	
		Schedules		29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	696	
		Counter-schedules+Pending		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		Counter-schedules		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		Net Schedules		29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	29	696	
	Remaining		71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	71	1704		
AC_S>N	<b>Totals</b>	<b>Total Capacity</b>		3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	3675	88200		
		Capacity Share		77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	77	1848		
		Schedules+Pending		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
		Schedules		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
		Counter-schedules+Pending		-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-696		
		Counter-schedules		-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-696		
		Net Schedules		-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-29	-696		
	Remaining		106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	106	2544			

<b>Total Capacity</b>	The total capacity available on the specified path.
<b>Capacity Share</b>	The share of the total capacity that the customer owns.
<b>Schedules+Pending</b>	Sum of the schedules that the owner submitted that use the specified path, plus those e-schedules in pending status. Schedules include contributions from the tagged energy profile; except for Capacity, Dynamic, and Pseudo-Tie type tags, which use the transmission profile for current and future hours, and energy profile for past hours.
<b>Schedules</b>	Sum of the schedules that the owner submitted that use the specified path. Schedules include contributions from the tagged energy profile, except for Capacity, Dynamic, and Pseudo-Tie type tags, which use the transmission profile for current and future hours, and energy profile for past hours.
<b>Counter-Schedules+Pending</b>	Sum of the schedules in which the owner uses the path in an opposite direction, plus those e-schedules in pending status. For example: if a customer has ownership of the N>S path and produces a tag that uses the S<N path, it will be credited the amount of the tag to the N>S share. The customer's net share of the path will be increased by the amount of the tag. Counter-schedules do not include contributions from Capacity, Dynamic, and Pseudo-Tie tag types.
<b>Counter-Schedules</b>	Sum of the schedules in which the owner uses the path in an opposite direction. Counter-schedules do not include contributions from Capacity, Dynamic, and Pseudo-Tie tag types.
<b>Net Schedules</b>	Sum of the schedules+pending and counter-schedules+pending that used the specified path. This amount is shown as a hyperlink. Click on the MW amount to see a list of e-tags that comprise the Net amount.
<b>Remaining</b>	Capacity that is available to the path owner. This is a calculated amount (Capacity Share – Net Schedules).

---

## Portfolio Management (Reservation Portfolio Manager)

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The Reservation Portfolio Management display provides a summary of Transmission Service Requests (TSRs or TSNs) and their associated MW values for a specified day.

### Filtering Options

The initial screen displays the last query performed unless *Disable Initial Display Query* option has been previously set. To set or change the query filters, click on the Filtering Options icon located on the toolbar in the upper right of the screen. Set the filters and then click **Apply** to display the results.

The available filters are:

<b>Time</b>	Select one of the following: Today, Yesterday, Next Day, Next Day +1 or Daily. When selecting Daily, type the date or click on the calendar.
<b>Provider</b>	Select BPAT.
<b>Customer</b>	Select ALL or specific customer(s) from the list of those your company has been authorized to view.
<b>Aref</b>	Leave blank or enter the Aref(s) of the Transmission Service Request(s) you want to view. To specify multiple AREFs, enter the numbers separated by a comma without spaces before or after the comma.
<b>EventID</b>	Enter an EventID to view the AREFs associated with that event.
<b>Request Type</b>	Select ALL or select specific Request Types to limit the results.
<b>POR</b>	Select ALL or select specific POR(s) to limit the results.



<b>POD</b>	Select ALL or select specific POD(s) to limit the results.
<b>Segment</b>	Specifies the segment to use for selecting records to view (not used by BPA).
<b>Path</b>	Specifies the path to use for selecting records to view (not used by BPA).
<b>Sale Ref</b>	Leave blank to view All or enter a specific Sale Ref (Contract #).
<b>Priority</b>	Select ALL or select specific Priorities to limit the results. The alpha character, that are applicable on the e-tag, are not displayed.
<b>Status</b>	Select ALL or select specific Status(s) to limit the results.
<b>TS Type</b>	Select ALL or select specific Status(s) to limit the results.
<b>TS Increment</b>	Select ALL or select specific Status(s) to limit the results.
<b>TS Class</b>	Select ALL or select specific Status(s) to limit the results.
<b>TS Window</b>	Select ALL or select specific Status(s) to limit the results.
<b>Range</b>	Select ALL or A<0. Selecting A<0 will display Transmission Service Requests where the Available amount is negative.
<b>Interval</b>	Sets the interval by which the hourly amounts will be displayed.
<b>SubInterval</b>	Determines which hours of the data are displayed when an interval other than 60 is selected in the Interval filter.
<b>Tag MW</b>	Determines whether the Scheduled Amount displayed is the Energy Profile MW values or the Transmission Profile MW values on the tag.
<b>Partial Method</b>	This controls whether the partial interval data will be displayed as an integrated value or as the minimum MW.
<b>Include</b>	Specify which records to display: Original, Remaining, Limit, EventID, Schedules, and Available. An explanation of each of these is provided in the next section.

## Column Options

The following columns can be added or removed from the report screen: Aref, Customer, Priority, Status, TS Class, TS Window, TS Increment, POR, POD, Source, Sink, and Hours (1-24). For more information about configuring columns, see [Column](#) Configuration section.

## Reservation Portfolio Management Report Screen

The data presented is based on criteria set in the filters and the columns that were selected to be displayed. It represents an aggregation of the conditions that have occurred for that hour.

GAT Portfolio Manager														Time: ◀ Daily (01/01/2020) ▶ Provider: BPAT POR: BIGEDDY Interval: 60 SubInterval: 0:00 to 24:00 Tag MW: Transmission Partial Method: Most Re													
Include: Original, Remaining, Limit, EventId, Schedule...																											
Provider	Customer	Aref	Priority	Status	POR	POD	TSType	X	For Hour Ending																		
									1	2	3	4	5	6	7	8	9	10	11	12	13	14					
BPAT			7	CONFIRMED	BIGEDDY	NOB	POINT_TO_POINT	O	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650				
								R	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650			
								L	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
								E																			
								A	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650	650		
BPAT			7	CONFIRMED	BIGEDDY	NOB	POINT_TO_POINT	O	15	15	15	15	15	15	15	15	15	15	15	15	15	15					
								R	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
								L	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
								E																			
								A	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		

**Green Shaded:** Partial Hour Data    **Red Shaded:** Negative Available    **White:** Current Hour

---

**Original (O)**                      Original reservation capacity requested or granted (depending upon the status of the request).

---

**Remaining (R)**                      Capacity available for the reservation less any TSR impacts (for example, Redirect, Recall or Resale activity against the reservation).

---

**Limit (L)**                              Revised capacity granted to the reservation based on reliability limits for the path identified on the reservation.

---

**Event (E)**                              An EventID is displayed when a reliability limit has been set.

---

**Schedule (S)**                              Aggregation of the tags associated with the reservation.

---

**Available (A)**                              Capacity still available for use. This is the lesser of Remaining minus Schedules or Limit minus Schedules.

---

**Note:** The Total section at the bottom of each screen shows the totals for the data shown on the current screen. The total does not include totals for any additional pages.

## Reservation Profile Detail

This screen shows the reductions against the Aref selected in the Portfolio Manager display.

The screenshot shows the 'Reduction Details' window for provider BPAT. The date range is 01/01/2020 to 01/01/2020. The reservation profile is 'CONFIRMED ORIGINAL' for the period 2007-01-01 00:00:00 PS to 2021-01-01 00:00:00 PS. A specific reservation is shown for 2020-01-01 00:00:00 to 2020-01-02 00:00:00, with a timestamp of 2020-01-27 14:40:04 PS.

Aref	Start-Stop Interval	AvailMW	GrantedMW	Bid	Offer
	2020-01-01 00:00:00 PS to 2020-01-02 00:00:00 PS -	0	85	1.3120	1.3120
			-85		CONFIRMED REDIRECT
	NET		0		

Although tags are displayed as hyperlinks, CDE permissions do not include access to the tagging system. The following message appears when a tag hyperlink is clicked:

**WARNING!**

A communication error may have occurred.

---

## Contract Portfolio Manager

---

The Contract Portfolio Management Report displays information about multi-path TSRs for a contract. It provides a summary of Transmission Service Requests (TSRs or TSNs) and their associated MW values for a specified day.

The information is a complex algorithm that combines the reservations into a summary view of the reservations as they affect the total capacity available to the customer.

## Selection Filters

The initial screen displays the last query performed unless *Disable Initial Query Display* option has been previously selected. To select data for viewing, open the Filtering Options list and select the filters. Click **Apply** to display the report.

The 'Filtering Options' dialog box contains the following settings:

- Date Range: Daily (01/01/2020)
- Provider: BPAT
- Customer: ALL
- Contract No: (Auto)
- Service Point: ALL
- Facility Id: (Auto)
- Facility Profile Type: ALL
- Range: ALL
- Interval: 60
- SubInterval: 0:00 to 24:00
- Tag MW: Transmission
- Partial Method: Most Restrictive
- Include: Original, Remaining, Schedule, Availa (Auto)

Buttons: Apply, Reset

The available filters are:

<b>Date range</b>	Select one of the following: Today, Yesterday, Next Day, Next Day +1 or Daily. When selecting Daily, type the date or click on the calendar.
<b>Provider</b>	Set to BPAT.
<b>Customer</b>	Select ALL or specific customer(s) from the list of those your company has been authorized to view.
<b>Contract Number</b>	Enter the contract number. To view multiple contracts, enter the number separated by a comma and without spaces. Example: 12345,23456
<b>Service Point</b>	Select All or select specific Service Points to view.
<b>Facility ID</b>	Enter Facility ID.
<b>Facility Profile Type</b>	Select ALL or limit to Load Forecast or Resource Capacity.
<b>Range</b>	Select ALL or A<0. If A<0 is selected, results will be limited those where the Available is negative.
<b>Interval</b>	Sets the interval by which the hourly amounts will be displayed.
<b>SubInterval</b>	Determines which hours of the data are displayed when an interval other than 60 is selected in the Interval filter.
<b>Tag MW</b>	Determines whether the Scheduled amount displayed is the Energy Profile MW values or the Transmission Profile MW values on the tags.
<b>Partial Method</b>	This controls whether the partial interval data will be displayed as an integrated value or as the minimum MW.
<b>Include</b>	Specify which records to display: Original, Remaining, Schedules, and Available. An explanation of each of these is provided below.

## Column Options

The following columns can be added or removed from the report screen: Provider, Customer, Contract Number, Facility Profile Type, Service Point Name, Include (X), Hours 1-24, and Total. For more information about configuring columns, see [Column](#) Configuration section.

## The Contract Portfolio Management Screen

The data in this report is a compilation of the reservations that are associated with multi-path reservations. To view specific transaction details, you must use Reservation Portfolio Manager.

For each Source, the report shows Resource Capacity for the Individual PORs associated with the reservations. In the example shown on the Contract Portfolio Management screen, resources are

broken down into two groups: AVA.BPAT and BOUNDARY. This represents the maximum capacity available for each POR.

For each Sink the report shows a Load Forecast for the individual PODs associated with the reservations. In the example show on the Contract Portfolio Management screen, Loads are shown for the Service Point BC.US.BORDER. This represents the maximum capacity available for each listed POD.

Contract Portfolio Management      Date Range: ◀ Daily (01/01/2020) ▶      Provider: BPAT      Interval: 60      SubInterval: 0:00 to 24:00      Tag MW: Transmission      Partial Method: Most Restrictive  
 Include: Original, Remaining, Schedule, Available

Provider	Customer	Contract No	Facility Profile Type	Service Point Name	X	For Hour Ending																			
						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	
BPAT			Load Forecast	BC.US.BORDER	O	643	643	643	643	643	643	643	643	643	643	643	643	643	643	643	643				
					R	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
					S	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
					A	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
BPAT			Resource Capacity	AVA.BPAT	O	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62				
					R	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62		
					S	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
					A	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	62	
BPAT			Resource Capacity	BOUNDARY	O	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023	1023			
					R	502	386	317	346	516	316	490	710	415	565	615	540	558	661	657	461	635	715	604	
					S	200	101	101	101	101	101	250	295	394	494	545	524	495	444	435	444	564	614	600	
					A	302	285	216	245	415	215	240	415	21	71	70	16	63	217	222	17	71	101	4	

The elements of the screen are listed below:

<b>Original (O)</b>	Original capacity of the aggregated reservations.
<b>Remaining (R)</b>	This is the Original capacity minus any recalls, redirects, resales.
<b>Schedules (S)</b>	Aggregation of the tags.
<b>Available (A)</b>	Capacity available for use is determined by subtracting the Schedule amount from the Remaining amount.

**Note:** Various actions affect the numbers presented in this report. The matrix below shows the impacts of reservations on how the values are derived.

Transmission Reservation	Event	POR POD Demand Adjustment
Contract Aref.	Recall MW capacity	No adjustment, since transmission path is reduced, but not necessarily the individual point demands.
Contract Aref.	MW Limit placed on Aref.	No adjustment.
Firm Redirect of Contract Aref.	Firm redirect TSR that has RelatedRef of a Contract Aref.	Reduce the POR and POD Demands by amount of Firm Redirect Aref.
Firm Redirect of Contract Aref.	Firm redirect TSR reaches dead state other than Displaced that has RelatedRef of a Contract Aref.	Restore POR and POD Demands by amount of Firm Redirect Aref.

<b>Transmission Reservation</b>	<b>Event</b>	<b>POR POD Demand Adjustment</b>
Firm Redirect of Contract Aref.	Firm redirect TSR is Displaced that has RelatedRef of a Contract Aref.	No adjustment, POR and POD demand will remain reduced by amount of Redirect.
Matching associated with Firm Redirect of Contract Aref.	Firm TSR is created to match a competitor where the matching TSR has RelatedRef of a Contract Aref.	No adjustment, POR and POD demand will remain reduced by amount of Redirect.
NonFirm Redirect of Contract Aref.	NonFirm Redirect TSR that has a RelatedRef of a Contract Aref.	Reduce POR and POD Demand by amount of NonFirm Redirect Aref.
NonFirm Redirect of Contract Aref.	NonFirm Redirect TSR reaches a dead state other than Displaced that has RelatedRef of a Contract Aref.	Restore POR and POD MW demand values by MW value the NonFirm redirect Aref.
Release TSR of a Redirect of a Contract Aref.	Release of Redirect TSR that has a RelatedRef of a Contract Aref.	Restore POR and POD MW demand values by MW value of the Release Aref. Note that partial releases may be necessary.
NonFirm Redirect of Contract Aref is Displaced.	Displacement of NonFirm TSR Redirect that has RelatedRef of a Contract Aref.	Restore POR and POD MW demand values by MW value of NonFirm redirect Aref.
Resale TSR has a ReassignedRef of a Contract Aref.	Any service type resale (firm or nonfirm) is submitted with ReassignedRef.	Reduce POR and POD demand by reassigned profile of the Resale TSR.
Resale TSR has a ReassignedRef of a Contract Aref.	Resale TSR reaches a dead state other than Displaced that has a ReassignedRef of a Contract Aref.	Restore POR and POD MW demand values by MW value for ReassignedRef profile on the Resale TSR.

**Note:** The system will not perform a parser check to ensure that the customer is within their CPM rights for request type of Resale.

## APPENDIX A: Alarms

All available Alarms will be displayed even if the user does not have access to a screen.

### Alarm Subscription Summary

Subscribe	Alarm Type Name	Description	Delivery Method	Alarm Preview
<b>Group Name : CDE Alarms</b>				
<input type="checkbox"/>	CDE Shared Path Summary	CDE Shared Path Summary	Application Header,Email,Envelope Tray,Popup,Text Message	<b>CDE Shared Path Summary</b>
<input type="checkbox"/>	Generation Estimates	Generation Estimates	Application Header,Email,Envelope Tray,Popup,Text Message	<b>Generation Estimates</b>
<input type="checkbox"/>	Load Estimates	Load Estimates	Application Header,Email,Envelope Tray,Popup,Text Message	<b>Load Estimates</b>
<input type="checkbox"/>	Loss Supply/Obligation Deficiency	Loss Supply/Obligation De	Application Header,Email,Envelope Tray,Popup,Text Message	<b>Loss Supply/Obligation Deficiency</b>
<input type="checkbox"/>	Plant Deviation	Plant Deviation	Application Header,Email,Envelope Tray,Popup,Text Message	<b>Plant Deviation</b>
<input type="checkbox"/>	Transmission Set Aside	Transmission Set Aside	Application Header,Email,Envelope Tray,Popup,Text Message	<b>Transmission Set Aside</b>
<input type="checkbox"/>	TX Owner Rights	TX Owner Rights	Application Header,Email,Envelope Tray,Popup,Text Message	<b>TX Owner Rights</b>
<b>Group Name : Scheduling Alarms</b>				
<input type="checkbox"/>	CDE Out of Service	CDE Out of Service	Application Header,Envelope Tray,Popup	<b>CDE Out of Service</b>

Alarm Name	Real Time	Pre - Schedule	Alarm Condition
Generation Estimates	N/A	N/A	Alarms if generator estimate is not received, for selected generators.
Load Estimates	N/A	N/A	Alarms if load estimate is not received.
Loss Supply/Obligation Deficiency	N/A	15:00	Loss supply does not equal loss obligation for a customer (owner).
Plant Deviation	Next hour at XX:25	18:00	Plant generation estimate does not equal the sum of all schedules to/from the plant plus/minus payback amounts, minus station service schedules.
Transmission Set Aside	Next hour at XX:25	15:00	Transmission demand schedules are less than reserve obligation requirements.
TX Owner Rights	N/A	N/A	Changes in transmission OTC causes a joint transmission owner's rights to change.

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## Version History:

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Version 6	04/11/2023 Version 6 <ul style="list-style-type: none"><li>• Updated Initial Login Information.</li><li>• Added Third Party CDE Access information.</li></ul>
Version 5	03/03/2023 Version 5 <ul style="list-style-type: none"><li>• Updated introduction</li><li>• Updated Hardware/Software section</li><li>• Added CDE System Display</li><li>• Added System Access Prerequisites</li><li>• Added Initial WebTrans Log On/Location</li><li>• Added Log On/Password Reset sections.</li><li>• Other minor corrections/clarifications as needed.</li></ul>
Version 4	4/12/2021 Version 4 <ul style="list-style-type: none"><li>• Replaced screenshots with updated screenshots.</li><li>• Change password: Updated to reflect the new password reset process</li><li>• Set Alarm Preferences: Updated to reflect new screens and process</li><li>• The Ancillary Reserve Obligation Report Screen: Clarified that third party suppliers will automatically have detail view privileges.</li><li>• Loss Imbalance Report – Selection Filters: Updated to state that a month to view can be selected instead of a date or date range.</li><li>• Appendix A: Updated list and definition of available alerts.</li><li>• Wordsmithing and formatting fixes.</li></ul>
Version 3	7/24/2017 Version 3 <ul style="list-style-type: none"><li>• Removed the Ancillary Service Data Report</li><li>• Updated the Operating Reserves Calculation to 3% for Generation and 3% for Load.</li></ul>
Version 2	9/18/14 Version 2 includes changes from the 5.2.2 webTrans release. Changes include: <ul style="list-style-type: none"><li>• Change password: Added Step 5.</li><li>• Ancillary Service Data Report: Added the following filtering options Start Hour, End Hour, User Archive. Under the Service Type/Type 4 added MGM Minimum Generation.</li></ul>



	<ul style="list-style-type: none"><li>• Entering Generation Estimates: added a new screen showing a non-VER Minimum Generation.</li><li>• Shared Path Summary: Added SubInterval to the Filtering Options.</li><li>• Shared Path Summary Report Screen: Added SubInterval. Added ability to view specific time increments when the Time filter is set to "This Hour and Next".</li><li>• Portfolio Manager: Under Filter Options, added TS Type, TS Increment, TS Class, and TS Window. Under the Priority Option, the alpha characters that were applicable on the etag have been removed.</li></ul>
Version 1	11/5/12