PORTAL APPLICATION/ROLE MAPPING REFERENCE GUIDE

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REVISION HISTORY

DATE	AUTHOR	CHANGE DESCRIPTION	COMMENTS
08/07/2012 Initial Draft	Becky Gifford	Created initial document	
08/31/2012	Becky Gifford	Modified	Based on SME feedback
02/07/2013	Alan Rainey	Added Markets MUI and Settlements roles	
03/14/2013	Josh Davis	Added Enterprise Notifications roles	
03/25/2013	Alan Rainey	Added Credit Limits roles	
07/29/2013	Doug Parks	Added Asset Owner, Meter Agent, and TCR Reports roles	
11/06/2013	Doug Parks	Added Markets MUI – WINDRSRCFCST_RO role	
11/15/2013	Doug Parks	Added Transmission Operator Report role	
01/09/2014	Doug Parks	Added View Meter Reports for MP role	
03/13/2014	Doug Parks	Added the APIs for the Markets MUI Roles	
05/01/2014	Doug Parks	Changed ERQ to EQR to correctly reflect the appropriate name	
08/28/2014	Doug Parks	Add MTE API URLs for the Markets MUI Roles	
09/05/2014	Nikki Eason	Replace URLs for Markets APIs with the Web Service Names	

08/04/2016	Josh Davis	Updated/verified roles for all applications Included new application roles. • Credit Stacking System (CSS) • Transmission Settlements System (TSS) • Ratings Submission Tool • Schedule Data API Updated the Markets UI/API description for the Transaction Log Read-Only role	Based on SME feedback and new roles developed since last publication.
09/21/2016	Josh Davis	Updated CSS (Z2) Roles to enable LSAs to assign access to Input Data reports.	
10/03/2016	Josh Davis	Updated the Transmission Settlement Role names and included the role necessary for Meter Agents to upload MVAR data.	Required for the COS Portal migration.
02/22/2017	Nikki Eason	Removed "Submit MVAR data" from Settlements Meter Data section; updated description of "Can Upload MA files" in the Transmission Settlements Section	
05/02/2017	Brett Reinhard	Added verbiage including corresponding Z2 Addendum to the CSS (Z2) Input Data Reports	
9/19/2017	Josh Davis	Added the MMP Application roles	
10/19/2017	Chris Baldwin	Removed Enterprise Notification Transmission Settlement Roles	

05/25/2018	Doug Parks	Added verbiage to the Credit Limits Application to include ability to submit requests via API	
08/14/2018	Adam Clemons	Added AO Statement XML role to the Settlement Reports Section	
08/15/2018	Nikki Eason	Reformatted guide to latest SPP report template	
09/20/2018	Todd Spence	Added the Reliability Communication Tool Member TOP user roles	
12/21/2018	Nikki Eason	Modified guide for the new Settlement system. All Settlement roles have been merged into two sections; Settlement – Market and Settlement – Transmission.	Required updates for Settlement System Replacement Project.

CONTENTS

INTRODUCTION

PURPOSE

The **Portal Application/Role Reference Guide** is meant to assist Local Security Administrators (LSA) with setting up users in the Portal.

As an LSA, you will have the ability to complete the following tasks:

- Add, edit, or delete a user from the Portal.
- Add or remove user roles from the Portal.
- Request, change, or add access to the Model Change Submission Tool (MSCT) for a user.

To add or remove user roles, LSAs will need to determine what application and what role within that application the user needs. This Reference Guide provides a list of all the applications available, as well as a description of each role within an application.

Please note that this Reference Guide is a living document and will change. As applications become available, SPP will add them and their corresponding roles to this document.

RELATED TRAINING

LSAs can also access training on the following tasks via the **Show Guide DO – LSA Portal** course in the Learning Management System (LMS):

- Adding, editing, or deleting a user
- Adding or removing user roles
- Requesting, changing, or adding MCST access for a user

CURRENT PORTAL AND API APPLICATION ROLES

CMT ASSET OWNER REPORTS

This tool allows users to view Asset Owner reports associated with their Market Participant.

Role	Description
View Asset Owner CMT Reports	The user can view Asset Owner reports for the specified market participant

CMT METER AGENT REPORTS

This tool allows users to view Meter Agent reports associated with their Market Participant.

Role	Description
View Meter Agent CMT Reports	The user can view Meter Agent Reports for the specified market participant

CREDIT LIMITS

This tool allows users to view credit limit information associated with their Market Participant.

Role	Description
View Credit Limit Information	The user can view credit limit information for the specified market participant through Marketplace Portal or API

CREDIT STACKING SYSTEM (CSS – Z2)

This tool allows users to access and view their Z2 detailed output reports (scoped by TO or TC). There is currently no API capability for these actions.

Role	Description
View Credit Stacking (Z2) TO Reports	The user can view their detailed CSS reports for the TOs that they have been granted access to.
View Credit Stacking (Z2) TC Reports	The user can view their detailed CSS reports for the TCs that they have been granted access to.
View Credit Stacking (Z2) TO Input Data	The user can view the input data used by CSS that is necessary for shadow calculations. TOs and TCs will see the same data. **A signed NDA registered with SPP and recorded within the CSS tool is necessary for either role to work**
View Credit Stacking (Z2) TC Input Data	The user can view the input data used by CSS that is necessary for shadow calculations. TOs and TCs will see the same data. **A signed NDA registered with SPP and recorded within the CSS tool is necessary for either role to work**

MARKET MONITORING PORTAL (MMP)

This tool allows Market Participants to submit the data required by the SPP Market Monitoring Unit in connection with Day Ahead Must Offers, cost-based offers, cost adder calculations, physical generator parameters, and development methodologies. (AO Scope)

NOTE: The tool is for browser-based access only.

Role	Description
Day Ahead Must Offer (DAMO) Read Only	Allows AO user to view transactions that have been entered for the Day Ahead Must Offer requirement
Day Ahead Must Offer (DAMO) Read/Write	Allows AO user to view and update transactions for consideration in the Day Ahead Must Offer requirement
Generator Detail Cost Read Only	Allows AO user to view infrequently-changing generator data used to calculate cost-based offers

Generator Detail Cost Read/Write	Allows AO user to view and update infrequently-changing generator data used to calculate cost-based offers
Generator Detail Parameters Read Only	Allows AO user to view data used in the formation of resource physical parameter reference levels
Generator Detail Parameters Read/Write	Allows AO user to view and update data used in the formation of resource physical parameter reference levels
Mitigated Offer Development Methodology (MODM) Read Only	Allows AO user to view offer development methodology documentation and associated resources
Mitigated Offer Development Methodology (MODM) Read/Write	Allows AO user to view and update offer development methodology documentation and associated resources
Opportunity Cost Calculations (OCC) Read Only	Allows AO user to view data regarding an MMU-approved opportunity cost adder calculations
Opportunity Cost Calculations (OCC) Read/Write	Allows AO user to view and enter inputs into an MMU-approved opportunity cost adder calculations
Plant Delivery Cost (PDC) Read Only	Allows AO user to view plant consumption, stocks and delivery data used to schedule cost-based offers
Plant Delivery Cost (PDC) Read/Write	Allows AO user to view and enter plant consumption, stocks and delivery data used to schedule cost-based offers

MARKETS UI/API (DAY-AHEAD & REAL-TIME BALANCING MARKETS INTERFACE)

This tool allows Market Participants to submit bids and offers, load forecasts and resource offers to the Day-Ahead and Real-Time Balancing Markets. It also allows participants to request information from the Markets system such as cleared bids and offers, commitment schedules and energy dispatch instructions.

NOTE: The following roles apply to the browser-based Markets UI as well as the Markets Web services.

Role	Description	Web Service (API)*
Demand Bid Read-Only	The user can view and download Demand Bids submitted by and cleared for the designated Asset Owner. The user cannot add, delete or change any data.	DemandService
Demand Bid Read-Write	The user can read, write, add, delete, update and download Demand Bids submitted by and cleared for the designated Asset Owner.	DemandService
Load Forecast Read-Only	The user can view and download Non- Conforming Load Forecasts submitted by the designated Asset Owner. The user cannot add, delete or change any data.	LoadforecastService
Load Forecast Read-Write	The user can read, write, add, delete, update and download Non-Conforming Load Forecasts for the designated Asset Owner.	LoadforecastService
Market Read-Only	The user can view and download Market public data (e.g. LMP, MCP, Markets Timeline).	MarketService
Notifications Read-Only	The user can view and download XML Notification Listener addresses registered by the designated Asset Owner.	NotifyService
Notifications Read-Write	The user can read, write, add, delete, update and download XML	NotifyService

	Notification Listener addresses for the designated Asset Owner.	
Resource Offer Read-Only	The user can view and download Resource Offers submitted by and cleared for the designated Asset Owner. The user can also view and download Reserve Zone obligations and requirements. The user cannot add or change any data.	EnergyService ReserveService
Resource Offer Read-Write	The user can read, write, add, update and download Resource Offers submitted by and cleared for the designated Asset Owner. The user can also view and download Reserve Zone obligations and requirements.	EnergyService ReserveService
Transaction Log Read-Only	The user can view and download transactions specific to the designated Asset Owner and assigned roles. The user cannot add, delete or change any data.	TransactionService
Virtual Bid/Offer Read-Only	The user can view and download Virtual Bids and Offers submitted by and cleared for the designated Asset Owner. The user cannot add, delete or change any data.	VirtualService
Virtual Bid/Offer Read-Write	The user can read, write, add, delete, update and download Virtual Bids and Offers submitted by and cleared for the designated Asset Owner.	VirtualService
Wind Resource Forecast Read-Only	The user can view and download Wind Resource Forecast data.	EnergyService

	Important: To use this role, the user will also need Resource Offer Read- Only or Resource Offer Read-Write permissions.	

MCST – MODEL CHANGE SUBMISSION TOOL

This tool allows Market Participants to update commercial model, reliability model, and contact information.

Role	Description
External Market Modeler Read Only Access	The user can read Market Model information in this application.
External Market Modeler Write Access	The user can read and write Market Model information in this application.
External Reliability Modeler Read Only Access	The user can read Reliability Model information in this application.
External Reliability Modeler Write Access	The user can read and write Reliability Model information in this application.

RATINGS SUBMISSION TOOL

This tool allows Transmission Owners to view and enter equipment ratings changes for review and approval by SPP.

Role	Description
Member User – Transmission Owner (company scoped)	The user can maintain equipment ratings for the company/companies scopes the user has been granted access to.

RCT – RELIABILITY COMMUNICATION TOOL

This tool allows real-time, two-way communication between the SPP Reliability Coordinator and Member Transmission Operators.

Role	Description
Transmission Operator Read Only	The user can view messages and reports.
Transmission Operator Admin	The user can create e-mail groups and templates for other users within your company.
Transmission Operator Desk	The user can send, receive, and acknowledge messages.

SCHEDULE DATA API

This tool allows users to download schedule data as early as OD+1. This is scoped at the AO level.

Role	Description
GetSchedules	The user can request schedule data for their registered **AO**.

SETTLEMENT - MARKET

The following applications allow users representing Asset Owners, Market Participants and Market Meter Agents to exchange data (submissions, view reports and results, register for notifications) for Market Settlement. Data may be exchanged via the Marketplace Portal or Settlements APIs.

Application	Role	Description
Settlement Bilateral Schedules	**Approve Profile Data**	The user can approve profile data for the given Asset Owner through Marketplace Portal and API.
Settlement Bilateral Schedules	**Manage Profile Data**	The user can submit profile data for the given Asset Owner through Marketplace Portal and API.
Settlement Bilateral Schedules	**Query Contract Headers and Profiles**	The user can search for Contract Headers and Profiles for the given Asset Owner.
Settlement Bilateral Schedules	**Approve Contract Headers**	The user can approve Contract Headers for the given Market Participant through Marketplace Portal and API.
Settlement Bilateral Schedules	**Manage Contract Headers**	The user can submit, update, or end Contract Headers for the given Market Participant through

		Marketplace Portal and API.
Settlement Bilateral Schedules	**View Fse Source Sink Report**	The user can view the settlement validation status of an FSE or GFA of which they are the Market Participant.
Settlement Meter Data	**View Meter Data**	The user can view uploaded meter data for the given Meter Agent.
Settlement Meter Data	**Submit Meter Data**	The user can submit meter data for the given Meter Agent through Marketplace Portal and API.
Settlement Meter Data	**View Meter Reports**	The user can view meter reports (Interchange Report, Calibration Report, and Meter Data Report Card) for the given Meter Agent through Marketplace Portal and API.
Settlement Meter Data	**View Meter Reports for MP**	The user can view meter reports (Interchange Report, Calibration Report, and Meter Data Report Card) for the given Market Participant through Marketplace Portal and API.
Settlement Meter Data	**View Meter Reports for AO**	The user can view meter reports (Calibration) for the given Asset Owner through the Marketplace Portal and API.
Settlement Notifications	**View AO Notification Registration**	Allows a user to view the registered Asset Owner information only.
Settlement Notifications	**Register for AO Notifications**	Allows a user to submit and update the registered Asset Owner information. • View Notification Registration • Add/Modify/Delete Email Addresses • Add/Modify/Delete Endpoint URLs • Select/De-select Notification Events Test Notifications
Settlement Notifications	**View MA Notification Registration**	Allows a user to view the registered Meter Agent information only.
Settlement Notifications	**Register for MA Notifications**	Allows a user to submit and update the registered Meter Agent information. • View Notification Registration • Add/Modify/Delete Email Addresses

		• Add/Modify/Delete Endpoint URLs • Select/De-select Notification Events Test Notifications
Settlement Notifications	**View MP Notification Registration**	Allows a user to view the registered Market Participant information only.
Settlement Notifications	**Register for MP Notification**	Allows a user to submit and update the registered Market Participant information. • View Notification Registration • Add/Modify/Delete Email Addresses • Add/Modify/Delete Endpoint URLs • Select/De-select Notification Events Test Notifications
Settlement Results	**View AO Bill Determinant Reports**	The user can view bill determinant reports for the given Asset Owner through Marketplace Portal and API.
Settlement Results	**View AO EQR Data**	The user can view FERC EQR Data for the given Asset Owner through Marketplace Portal and API.
Settlement Results	**View MP Settlement Invoices**	The user can view Settlement Invoices for the given Market Participant through Marketplace Portal and API.
Settlement Results	**View MP Settlement Statements**	The user can view Settlement Statements for the given Market Participant through Marketplace Portal and API.
Settlement Results	**View AO Settlement Statements**	The user can view Settlement Statements for the given Asset Owner through Marketplace Portal and API.

SETTLEMENT - TRANSMISSION

The following applications allow users representing Transmission Customers or Transmission Owners to exchange data (submissions, view reports and results, register for notifications) for Transmission Settlement. Data may be exchanged via the Marketplace Portal or Settlements APIs.

Note: MVAR data is submitted by the Transmission Customer which requires the "Submit TC Settlement Data" role.

Application	Role	Description
Settlement	**Register for TC**	Allows a user to view and update the

Notifications	**Notifications**	registered Transmission Customer information. • View Notification Registration • Add/Modify/Delete Email Addresses • Add/Modify/Delete Endpoint URLs • Select/De-select Notification Events • Test Notifications • Save Notification Registration
Settlement Notifications	**Register for TO Notifications**	Allows a user to view and update the registered Transmission Owner information. • View Notification Registration • Add/Modify/Delete Email Addresses • Add/Modify/Delete Endpoint URLs • Select/De-select Notification Events • Test Notifications • Save Notification Registration
Settlement Notifications	**View TC Notification Registration**	Allows a user to view the registered Transmission Customer information only.
Settlement Notifications	**View TO Notification Registration**	Allows a user to view the registered Transmission Owner information only.
Settlement Results	**View TC Bill Determinant Reports**	The user can view bill determinant reports for the given Transmission Customer through Marketplace Portal and API.
Settlement Results	**View TO Bill Determinant Reports**	The user can view bill determinant reports for the given Transmission Owner through Marketplace Portal and API.
Settlement Results	**View TC Settlement Invoices**	The user can view Settlement Invoices for the given Transmission Customer through Marketplace Portal and API.
Settlement Results	**View TO Settlement Invoices**	The user can view Settlement Invoices for the given Transmission Owner through Marketplace Portal and API.
Settlement Results	**View TC Settlement Statements**	The user can view Settlement Statements for the given Transmission Customer through Marketplace Portal and API.
Settlement Results	**View TO Settlement Statements**	The user can view Settlement Statements for the given Transmission Owner through Marketplace Portal and API.
Settlement Results	**View TC Settlement Summary**	The user can view Settlement Summary Report for the given Transmission

		Customer through Marketplace Portal and API.
Settlement Results	**View TO Settlement Summary**	The user can view Settlement Summary Report for the given Transmission Owner through Marketplace Portal and API.
Settlement Transmission	**View Transmission Settlement TC Info**	The user can view and download their respective Miscellaneous Adjustment supporting documentation and Legacy settlement data (statements, summaries, invoices, etc.) for the Transmission Customer.
Settlement Transmission	**View Transmission Settlement TO Info**	The user can view and download their respective Miscellaneous Adjustment supporting documentation and Legacy settlement data (statements, summaries, invoices, etc.) for the Transmission Owner.
Settlement Transmission	**View Legacy MVAR Upload Files**	The user can view their respective Legacy MVAR submissions by the Meter Agent.
Settlement Transmission	**Submit TC Settlement Data**	The user can view and submit their respective Transmission Customer settlement input data (Monthly Assessment, Direct Assignment, Coincident Peak, Schedule 12 and MVAR), if applicable.
Settlement Transmission	**Submit TO Settlement Data**	The user can view and submit their respective Transmission Owner settlement input data (Monthly Assessment, Direct Assignment, Coincident Peak, and Schedule 12), if applicable.

TCR MUI (TRANSMISSION CONGESTION RIGHTS MARKET USER INTERFACE)

This tool allows Market Participants to request a verification of Transmission Service, as well as submit Auction Revenue Rights (ARR) Nominations, bids to purchase and self-convert TCRs, and purchase TCRs from the Secondary Market.

Role	Description
Read Only Access	The user can view and download data only for the designated Asset Owner in the iHEDGE MUI. The user cannot add, delete, or change any data.

Read/Write Access	The user can read, write, add, delete, manipulate, and download data for the designated Asset Owner in the iHEDGE MUI.

TCR REPORTS

This tool allows users to view TCR reports associated with their Market Participant.

Role	Description
View Reports	The user can view TCR Reports for the specified market participant

TRANSMISSION OPERATOR REPORTS

This tool allows users to view Transmission Operator reports associated with their Market Participant.

Role	Description
View Reports	The user can view Transmission Operator Reports for the specified market participant