

## SERC PORTAL OVERVIEW

The SERC Portal provides an online, secure vehicle through which SERC's Compliance Enforcement Program, reliability assessment data collection and coordination, recommendation tracking, and many other corporate and member activities are conducted.

The SERC Portal has enabled the Region to have a single, secure repository for all SERC data, compliance filings and mitigation plans. Integrated with a user friendly web interface, the SERC Portal ensures secure interaction with a structured query language (SQL) database. Predetermined real-time reports are available for members and SERC Staff to view desired information from the system. SERC Staff has the ability to query the database directly through secure virtual private network (VPN) access. The SERC Portal enables the Region to promptly adapt to the dynamic nature of compliance enforcement for Bulk-Power System users, owners and operators within the Region. This system will be indispensable as the number of entities increases significantly with the implementation of mandatory compliance with reliability standards by all users, owners and operators of the Bulk-Power System.

The SERC Portal is a secure central database to provide both Members and non-members of SERC with a systematic way to obtain and file compliance certifications and data to SERC, and for SERC to track non-compliances and mitigation plans to completion. With the increase in the number of entities registering as users, owners and operators of the Bulk-Power System in the SERC Region, the SERC Portal is indispensable in expanding the Compliance Enforcement Program to those entities. Based on each entity's registration information, the SERC Portal programming will ensure the entities in the registration database are properly assigned to the Compliance Enforcement Program. The database will also provide a basis for auditing SERC's Compliance Enforcement Program. Exceptions will be addressed by the compliance manager and staff.

The SERC Portal is also a central repository for all SERC reliability committees and subgroups. By offering committees a secure area to share documents, as well as temporary read-only access for review groups to view compliance filings, the SERC Portal increases efficacy and productivity among the Region. Equipped with the ability to assign roles and access permissions on a per user basis, the SERC Portal allows multiple, distinct levels of user access required to facilitate segmentation, when needed, of expertise among the reliability committees. Allowing Portal users to view committee rosters and individuals' contact information throughout the region promotes communication without the information being available to the public.

## MASTER ACCOUNTS

Each registered organization is assigned a unique Master Account Name within the SERC Portal. Compliance filing requirements and other reporting requirements are assigned to each Master Account based on the functions for which that organization is registered. A SERC Portal Master Account can accommodate multiple functions, users, contacts and authorized officers. Roles and permissions for each user within each Master Account can be assigned individually by that organization's Master Account Administrator to accommodate functional separation and assignments within organizations.

## MASTER ACCOUNT ADMINISTRATORS

Each Master Account must have at least one Master Account Administrator assigned to manage that organization's employees access to the SERC Portal. There can be more than one Master Account Administrator for a single organization however caution should be exercised in establishing more than one Master Account Administrator. The duties and responsibilities of the Master Account Administrator are (Note: These responsibilities are Master Account specific):

- Become the Point Of Contact for Portal Users in your organization (Company Contacts) and for the SERC Portal Administrators.
- Create new users (Contacts) under the Master Account.
- Edit existing users (Contacts) under the Master Account.
- Assign Roles and Security Permissions to new and existing users to various sections of the system (compliance/reliability assessment data collection/member voting rights, etc.).
- Edit Organization Registration information for your Master Account
- Reset Passwords for your Master Account users, if necessary.

To view the SERC Master Account Administrator Training Document, [click here](#).