Guideline

SERC Reliability Portal
User Reference Guide

Department Advanced Analytics & Technical Services (AATS)	Document Type Guideline	Title/Subject SERC Reliability Portal User Reference Guide		Number Guide-800390
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1.0 Purpose

SERC Reliability Corporation (SERC) uses the SERC Reliability Portal to collect data from registered entities and SERC members. Data requests and reporting schedules are available on the *Data Collection* page of the SERC public website. This document provides users with instructions for using the SERC Reliability Portal to view, edit, and submit required data forms; view data forms submitted in previous reporting years; manage contact permissions; and view reports.

2.0 Logging into the Portal

The SERC Reliability Portal uses the same login credentials as the SERC Compliance Portal. Log in with the username and password that you use for the SERC Compliance Portal. If you do not have a username or if you are logging into a SERC system for the first time, contact your company's Entity Administrator (EA) to obtain your username, and then follow the steps under **I Forgot My Password** to set your login password. If you do not know the EA for your company, contact *support@serc1.org* for additional information.

You can access the SERC Reliability Portal at *https://raportal.serc1.org*. On the SERC Reliability Portal Login screen, enter your username and password, then click **Secure Login**.

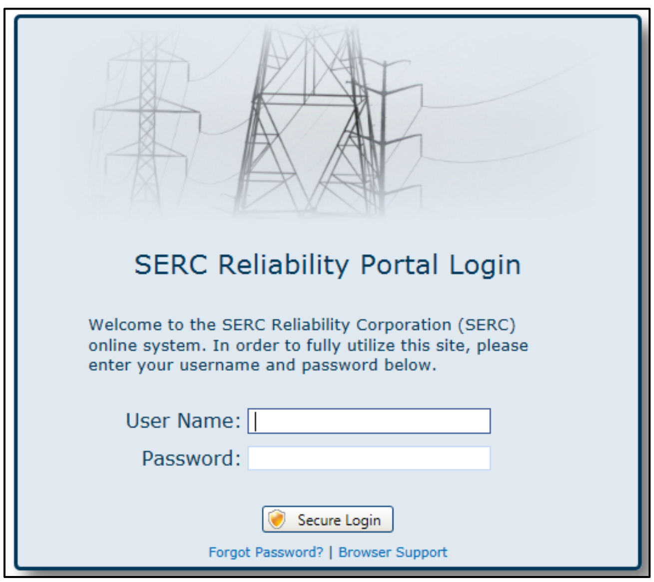


Figure 1: SERC Reliability Portal Login Screen

2.1 Password Requirements

SERC requires that you use a secure password that meets these requirements:

1) Your password may not contain any part of your name or your username exceeding two consecutive characters.
2) Your password must be at least 8 characters in length.
3) Your password must contain characters from 3 of the following 4 categories:
    a) Uppercase characters (A through Z)
    b) Lowercase characters (a through z)
    c) Numbers (0 through 9)
    d) Non-alphanumeric characters (such as: !, $, @, %)

For security purposes, the SERC Portal system requires you to change your password at least once every 120 days.

2.1.1 Changing Your Password

Follow these steps to change your password:

1) After logging into the SERC Reliability portal, select **Portal Administration** from the left menu, then click **Change Password** to display the **Contact Editor** screen.

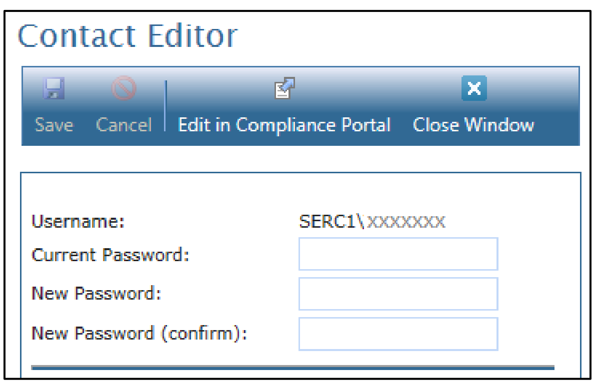


Figure 2: Contact Editor Screen (Change Password)

2) On the **Contact Editor** screen:
    a) Enter your **Current Password**.
    b) Enter your **New Password**.
    c) Enter your **New Password** again to confirm.

d) Click **Save** in the menu ribbon.

You can also change your password in the SERC Compliance Portal by selecting **System Administration**, then **Change Password**.

2.1.2 I Forgot My Password

Follow these steps if you have forgotten your password:

1) Go to *https://raportal.serc1.org*.
2) Click “**I forgot my password**” at the bottom of the screen.
3) Enter your username and the email address associated to your username, then click **Send Email**.
    a) If the entered username and email address match the information in the portal database, you will receive an email notification with a link to create a new password.
    b) The email will be sent from the SERC Comply email address <SERCComply@serc1.org>. You should receive the email within five minutes. If you do not receive password reset instructions within five minutes, check your junk mail folder to ensure that your email program did not filter out the automated email as spam.
    c) The link in the email will only be available one time and expires one hour from the time it was generated.
4) Click the link in the email message to display the Change Password screen.
5) Update your password.
    a. Enter your New Password.
    b. Enter your New Password again to confirm.
    c. Click **Change Password**.

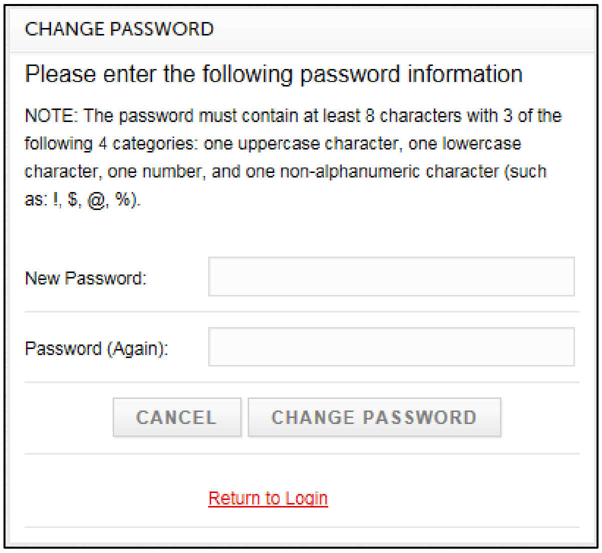


Figure 3: Change Password screen (I Forgot My Password)

3.0 Portal Home Page

After logging in to the system, users land on the Portal Home Page.

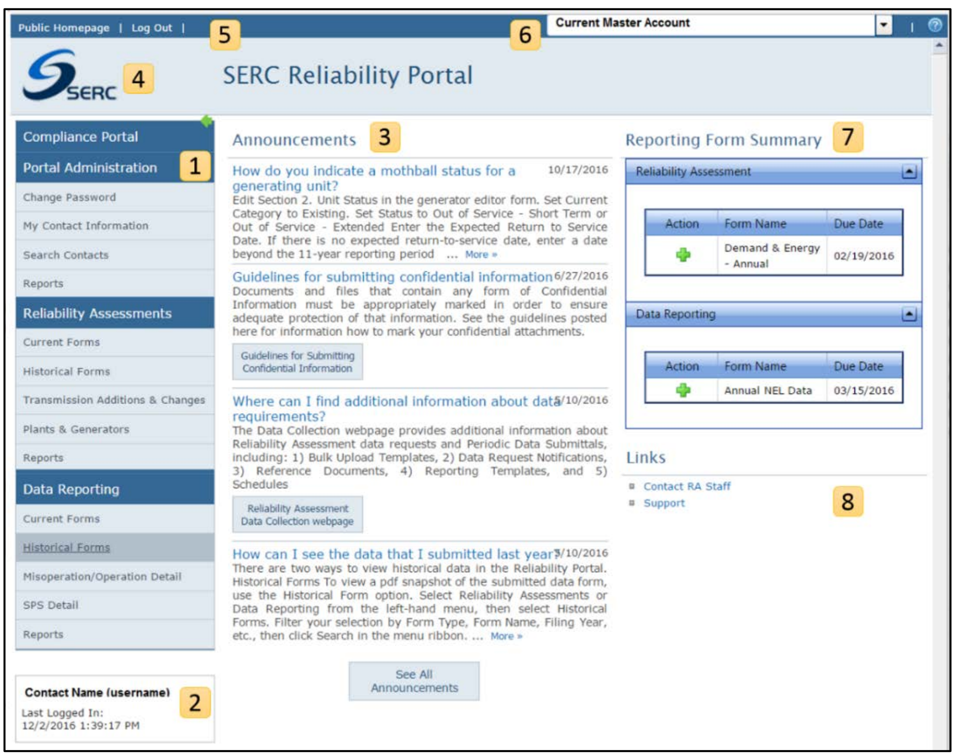


Figure 4: SERC Reliability Portal Home Page

Refer to the numbers in *Figure 4: SERC Reliability Portal Home Page* to locate each of the following screen elements.

1	**Left Navigation Menu**	This menu contains links to open the Compliance portal to view or edit contact information, data forms, and reports. More detailed information is provided in Section 5.0 below.
2	**Current Contact Information**	This area displays the current user information and the time the user last logged into the system.
3	**Announcements**	The **Announcements** area displays current system announcements and frequently asked questions.
4	**SERC Logo**	The **SERC Logo** serves as a home page link. Click this icon from anywhere in the portal to return to the portal home page.
5	**Top Menu**	This menu provides a link to the SERC home page and a link to the command to log out of the system.
6	**Master Account (company) Selection**	This field displays the currently selected master account. If the current user has access to more than one company, the master account displays as a drop-down list. If the current user does not have access to more than one company, the master account displays as a label.
7	**Reporting Form Summary**	This area displays a list of un-submitted reporting forms that have a due date occurring within 30 days. Click on the green **+** to open the data form.
8	**Quick Links**	The **Quick Links** area provides links to contact SERC staff and other relevant web links.

4.0 User Permissions

Each master account (company) should designate at least one contact as the Master Account Administrator (MAA). In the SERC Reliability Portal, the MAA manages permissions for other contacts. The Entity Administrator (EA) must use the SERC Compliance Portal interface to create or remove all user IDs.

These three roles, or permission levels, are available in the SERC Reliability Portal:

Abbreviation	Role Name	View Data Forms And Reports	Edit and Submit Data Forms	Manage User Permissions
RAV	Reliability Viewer	X	-	-
RAC	Reliability Contributor	X	X	-
MAA	Master Account Administrator	X	X	X

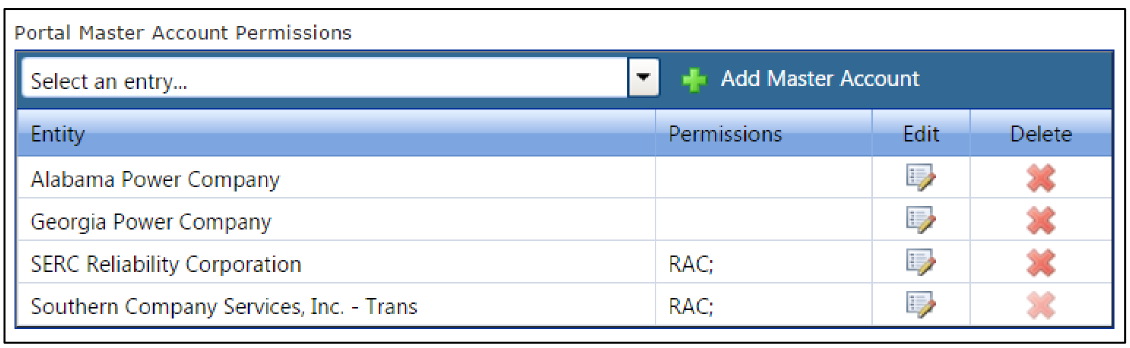
Table 1: User Permissions

The default role for all new users is RAV (Reliability Viewer).

Users with the Master Account Administrator role must follow these steps to manage permissions for other users:

1) Search for and edit the contact using the steps described in Section 5.2.3.

   The companies and roles for the contact display at the bottom of the screen.



Portal Master Account Permissions

Select an entry... | Add Master Account

Entity	Permissions	Edit	Delete
Alabama Power Company			
Georgia Power Company			
SERC Reliability Corporation	RAC;		
Southern Company Services, Inc. - Trans	RAC;		

Figure 5: Portal Master Account Permissions

2) Update the roles for the contact.

   a) To change the contact's role for a company in the grid, click the icon in the Edit column. Select the new role in the Contact Master Account Roles dialog box, then click Save.

Figure 6: Contact Master Account Roles Dialog Box

b) To remove a company from the grid, click the icon in the Delete column. The delete option is not available when the company selected is the same entity as the Employer listed on the contact editor screen.

c) To add a company to the grid, select the company name from the drop-down list, then click the green + to Add Master Account. The Contact Master Account Roles dialog displays. Select the new role, then click **Save**.

Figure 7: Portal Permissions (Add Master Account)

3) Click **Save** in the Contact Editor menu ribbon to complete the updates.

5.0 Left Navigation Menu

This section provides details for using the Left Menu Navigation and the functionality accessed from the menu.

5.1 Compliance Portal

Click on the **Compliance Portal** link to open the SERC Compliance Portal login screen in a new tab in the browser window.

5.2 Portal Administration

Click on the **Portal Administration** link to expand the left menu to view these options:

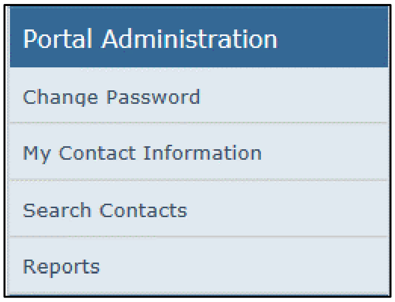


Figure 8: Portal Administration Menu Items

5.2.1 Change Password

Click the **Change Password** link to open the Contact Editor screen to change your password. See *Figure 2: Contact Editor Screen*.

5.2.2 My Contact Information

Click the **My Contact Information** link to open the Contact Editor screen to view your contact information. Most data on this screen is read-only. Access the SERC Compliance Portal to update this information.

5.2.3 Search Contacts

Click the **Search Contacts** link to search for contact information for other system users.

To search for a contact, enter your search criteria in the **Contact Search** screen, then click **Search** in the menu bar. Click the icon in the **Action** column to open the Contact Editor screen.

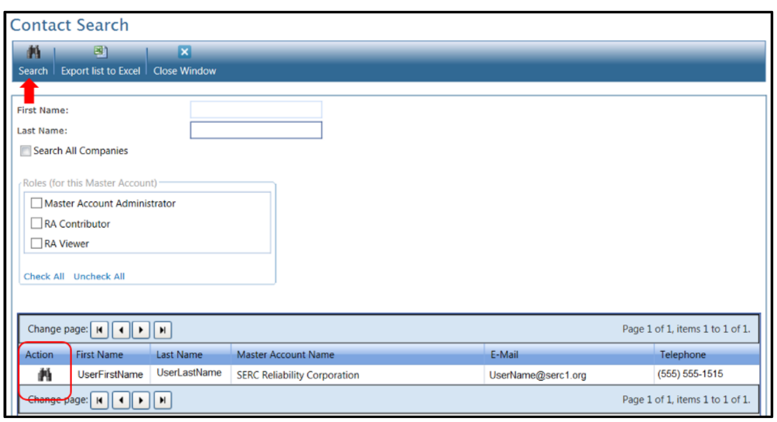


Figure 9: Contact Search Screen

5.2.4 Reports

Click the **Reports** link to view a list of user information reports.

To view a report, select the output format (Word, Excel, or PDF) from the drop-down list in the **Render Type** column, then click the icon in the **Action** column to download the report.

Not all reports are available for all contacts. The current user’s permission level determines the list of reports displayed.

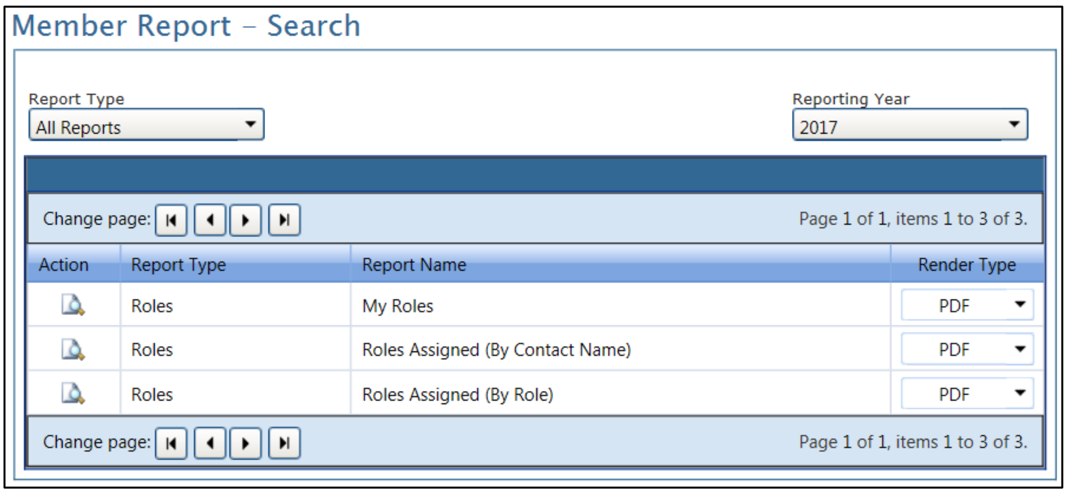


Figure 10: Member Report Search Screen

5.3 Reliability Assessments

Click on the **Reliability Assessments** link to expand the left menu to view these options:

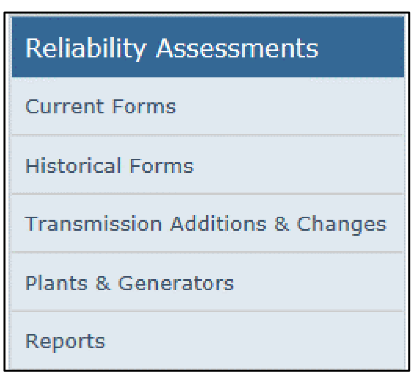


Figure 11: Reliability Assessments Menu Items

5.3.1 Current Forms

Click the **Current Forms** link to display the Current Reliability Assessment Forms Search Screen. This screen displays all forms that have been assigned for the selected Master Account.

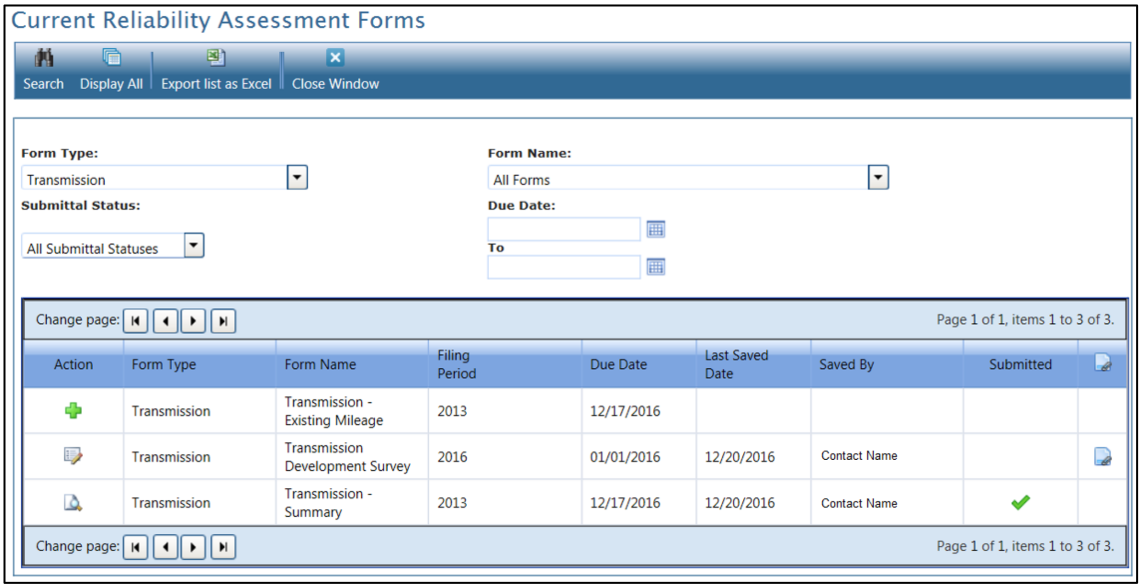


Figure 12: Current Reliability Assessment Forms Search Screen

The forms display in a grid at the bottom of the screen. To sort the list of forms, click once in the column header to display the forms in ascending order, click again to display the forms in descending order, click a third time to display in the default order.

Click the icon in the first column to open the form. The icon indicates the action that the current user can perform on the form. The available actions are:

Icon	Icon Action	Form Status
	Open the form for viewing and editing. The form has been saved but has not been submitted.	Read-Write
	Open the form for viewing and editing. The form has not been saved.	Read-Write
	Open the form for viewing. The form has been submitted, or the current user has View access only.	Read-Only

Table 2: Current Forms Action Icons

The next two columns display the **Form Type** and the **Form Name**.

The fourth column displays the **Filing Period** for the form.

The next column displays the **Due Date**, followed by the **Last Saved Date** and **Last Saved By** contact.

If a green check mark appears in the **Submitted** column, the form has been submitted and is read-only.

The last column is an attachment indicator. If there is an icon in that column, click the icon to view the files included with the form submittal.

5.3.1.1 Current Form Search Filters

The Current Data Reporting Forms search results screen provides these fields to specify search criteria:

Filter Criteria Type	Description
Form Type	Select the Form Type from the drop-down list (e.g., Demand & Energy, Transmission, etc.).
Form Name	Select the specific form name from the drop-down list (e.g., Written Assessment, Capacity Transfers, etc.).
Submittal Status	Select the submittal status from the drop-down list (New, Saved, or Submitted).
Due Date	Enter the due date as a range; both the beginning date and the ending date are required when you search by date.

Table 3: Search Criteria Fields

Select one or more filter criteria from the choices displayed, then click **Search** in the menu ribbon. To return to the default display of all forms, click the **Display All** icon.

Click the **Export list as Excel** link in the menu ribbon to create a comma separated value (.csv) file containing all information displayed in the forms grid.

Click **Close Window** to return to the portal home page.

5.3.2 Historical Forms

Click the **Historical Forms** link to display the Member Reliability Assessment Historical Forms Search Screen. This screen displays all forms that have been submitted in previous reporting periods for the selected Master Account.

The forms display in a grid at the bottom of the screen. To sort the list of forms, click once in the column header to display the forms in ascending order, click again to display the forms in descending order, click a third time to display in the default order.

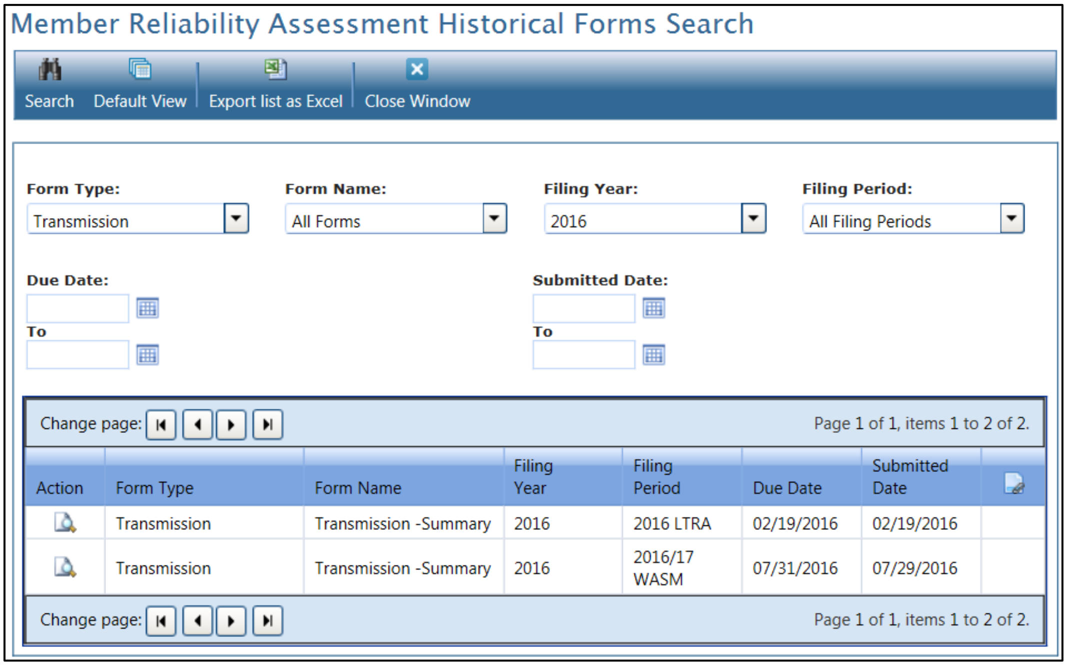


Figure 13: Member Reliability Assessment Historical Forms Search Screen

Click the icon in the first column to view a .pdf image of the form. If present, click the icon in the attachments column to open the Attachments Manager dialog box to view documents uploaded to the form prior to submittal.

You can use the search feature at the top of the form to display only selected forms in the grid. Select one or more filter criteria from the choices displayed, then click **Search** in the menu ribbon. (See Section 5.3.1.1 for additional information.)To return to the default display of all forms, click the **Display All** icon.

5.3.3 Transmission Additions and Changes

Click the **Transmission Additions and Changes** link to open the Transmission Additions and Changes Search Results screen. Use this screen to view and edit the list of transmission additions and changes scheduled during the next ten years. Click the checkbox labeled **Include completed, cancelled, and indefinitely postponed projects in list** to view all records for the selected company.

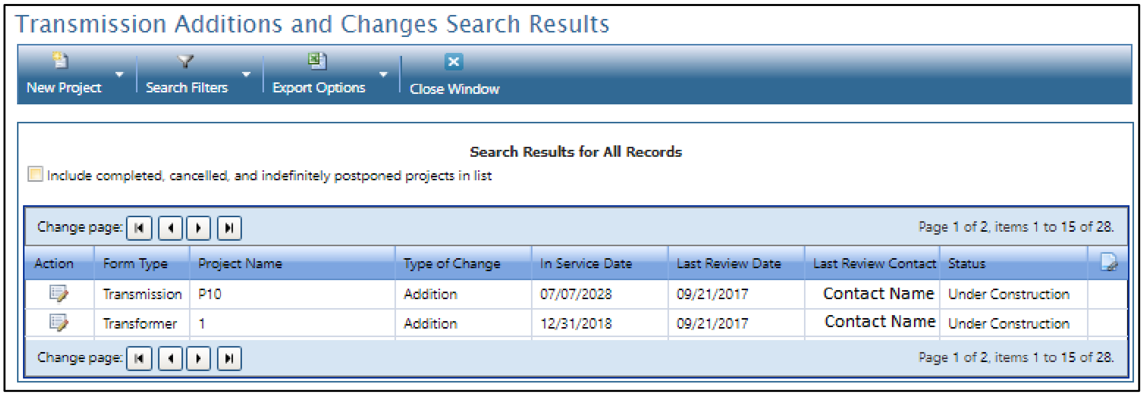


Figure 14: Transmission Additions and Changes Search Results Screen

The following controls are available on this screen:

New Project	Click the **New Project** link to add a new transmission or transformer addition or change record.
Bulk Import	Click the **Bulk Import** link to open the **Bulk Import** dialog box to upload multiple records from an XML template.
Search Filters	Click the **Search Filters** to filter the display. Options in the list include **Display All**, **Display Transmission Only**, and **Display Transformers Only**.
Export Options	Click **Export Options** to export data to a comma separated value (.csv) file.
Close Window	Click **Close Window** to return to the portal home page.

These documents provide details for adding, changing, and removing transmission and transformer additions and changes records:

- *Reference Guide - Transformer Changes and Additions*
- *Reference Guide - Transmission Changes and Additions*

5.3.4 Plants & Generators

Click the **Plants & Generators** link to open the Plant Search screen. Use this screen to view and maintain the inventory of plants and generators associated with the selected company.

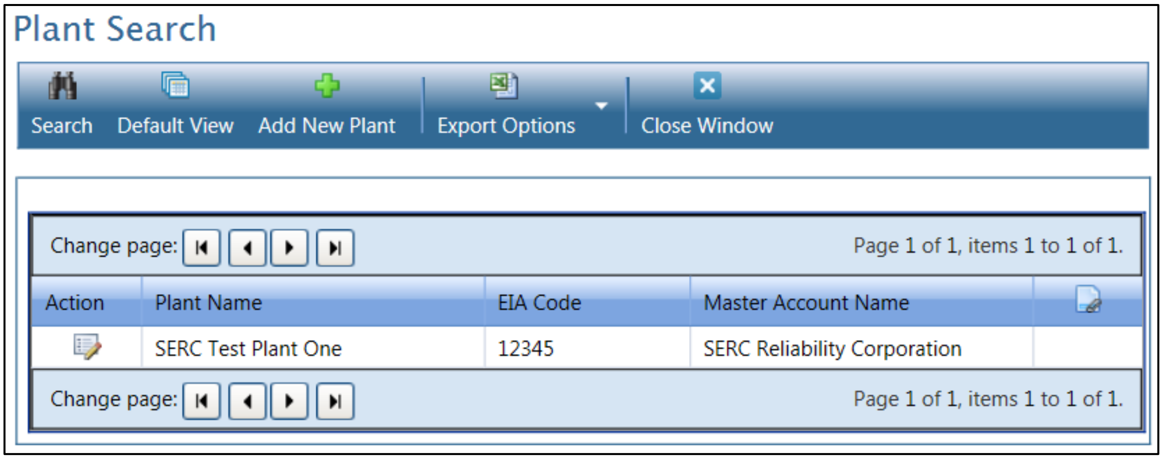


Figure 15: Plant Search Screen

The following controls are available on this screen:

Search	Click the **Search** link in the menu ribbon to display search criteria fields (Plant Name, State, etc.). Enter data in at least one of these fields then click **Search** again to filter the list of plants displayed.
Default View	Click **Default View** to display all plants for the currently selected Master Account.
Add New Plant	Click **Add New Plant** to add a new plant.
Export Options	Click **Export Options** to display export selections which include **Export Plant Data** and **Export Generator Data**. Selecting one of those options exports data details to a comma separated value (CSV) file.
Close Window	Click **Close Window** to return to the portal home page.

The *Plant and Generator Reference Guide* provides details for adding, changing, and removing plant and generator records.

5.3.5 Reports

Click the Reports link to open the Member Report Search screen. Use this screen to view reports for previously submitted data. The report choices include:

- data details,
- data summaries,
- submittal summaries, and
- data validation and comparisons.

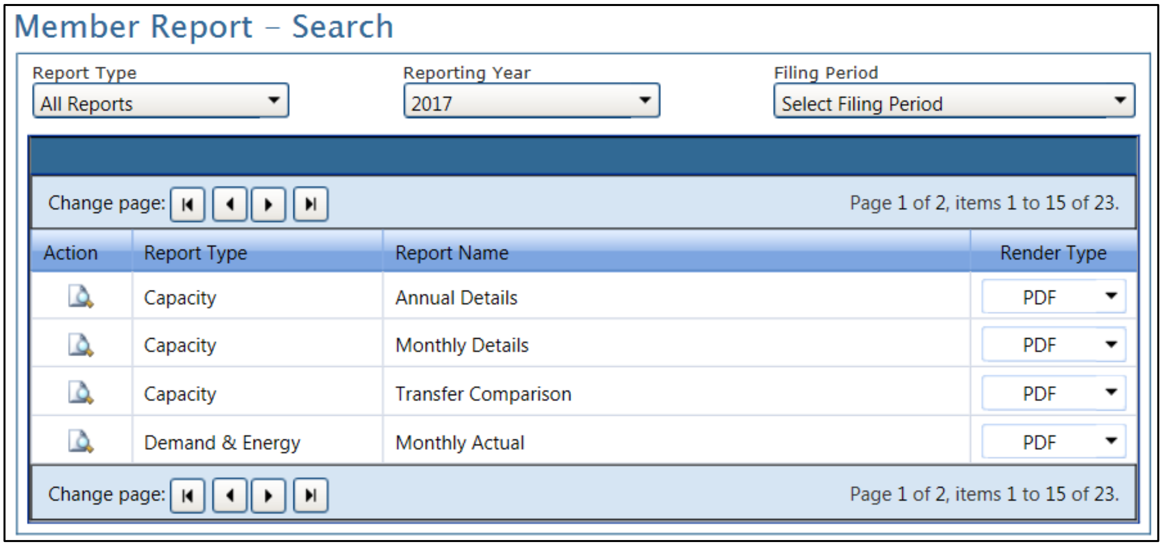


Figure 16: Member Report Search Screen

The following controls are available on this screen:

Report Type	Select an option from the **Report Type** drop-down list to filter the list of reports displayed in the search screen.
Reporting Year and **Filing Period**	Select an option from the **Reporting Year** drop-down list or the **Filing Period** drop-down list, or both, to specify the data to include in the report.
Render Type	Select the desired output format (Word, Excel, or PDF) from the drop-down list in the **Render Type** column.

To view a report, select the output format (Word, Excel, or PDF) from the drop-down list in the **Render Type** column, then click the icon in the Action column to download the report.

5.4 Data Reporting

Click on the Data Reporting link to expand the left menu to view these options:

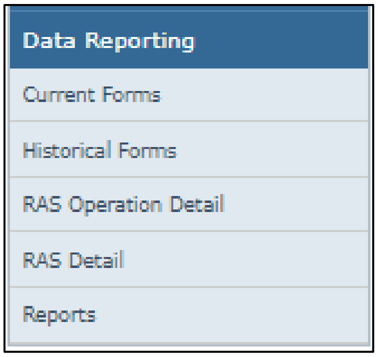


Figure 17: Data Reporting Menu Items

5.4.1 Current Forms

The functionality for this section is the same as that described in Section 5.3.1 above.

5.4.2 Historical Forms

The functionality for this section is the same as that described in Section 5.3.2 above.

5.4.3 RAS Operation Detail

Click the **RAS Operation Detail** link to open the RAS Operation Detail Forms search page. Use this screen to view and edit RAS/SPS Operation details.

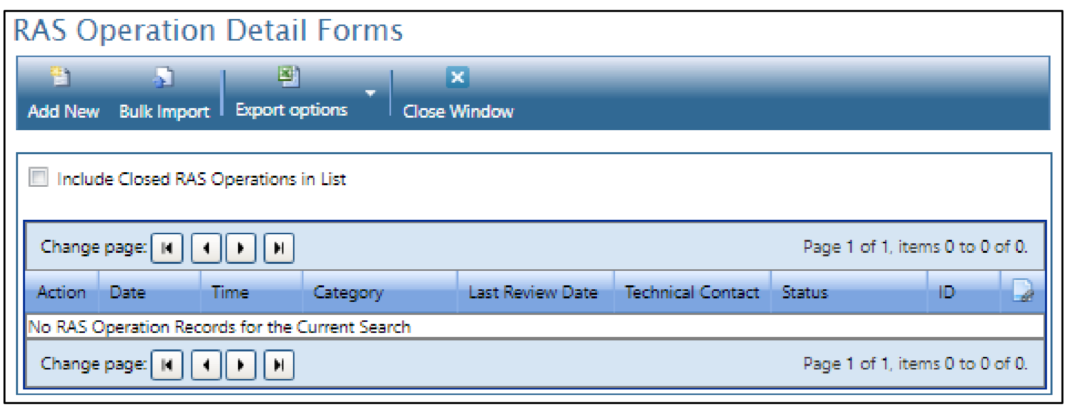


Figure 18: RAS Operation Detail Forms Search Screen

The following controls are available on this screen:

Add New	Click the **Add New** link to add a new RAS Operation record.

Export Options Click **Export Options** to export data or a list of RAS Operations to a comma separated value (CSV) file.

Close Window Click **Close Window** to return to the portal home page.

The *RAS Operation Reference Guide* provides details for adding, changing, and managing RAS Operation data.

5.4.4 RAS Detail

Click the **RAS Detail** link to open the Remedial Action Schemes (RAS) Search Results page. Use this screen to view and edit RAS details.

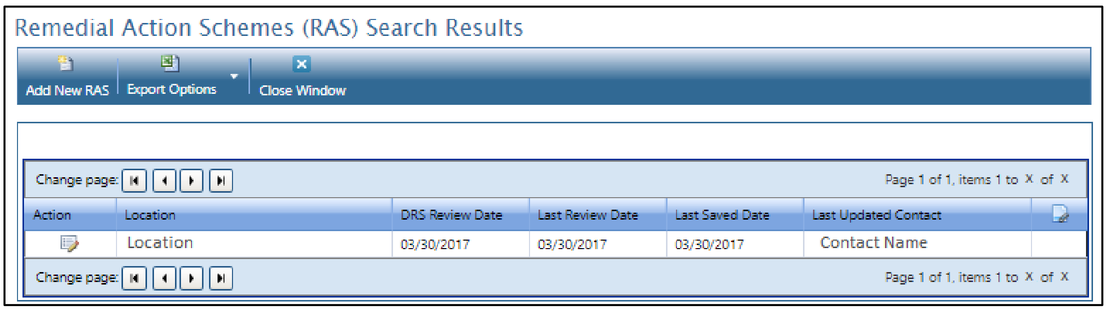


Figure 19: Remedial Action Schemes (RAS) Search Results Screen

The following controls are available on this screen:

Add New RAS Click the **Add New RAS** link to add a new RAS record to the database.

Export Options Click the **Export Options** link to export the list of records or the data details to a comma separated values (CSV) file.

Close Window Click **Close Window** to return to the portal home page.

The *Remedial Action Scheme (RAS) Data Reference Guide* document provides details for adding, changing, and removing RAS records to the system database.

5.4.5 Reports

The functionality for this section is the same as that described in Section 5.2.4 above.

6.0 Bulk Import Functionality

This section describes the bulk import functionality for data reporting. Several reporting forms offer a bulk upload feature that allows the user to import data into the portal using an XML template. You can access the Bulk Upload Templates on the *Data Collection* page of the SERC public website. From the SERC home page, select Program Areas » Reliability Assessments & Performance Analysis » Reliability Assessments » Data Collection.

6.1 Initiating the bulk upload feature

The user clicks a Bulk Import icon to begin the bulk upload process. The location of the icon depends on the form type.

Scheduled Forms

The icon is displayed in the Action column of the Current Forms search screen for scheduled forms (e.g., Disturbance Monitoring Equipment (DME), Under Frequency Load Shedding (UFLS), etc.)

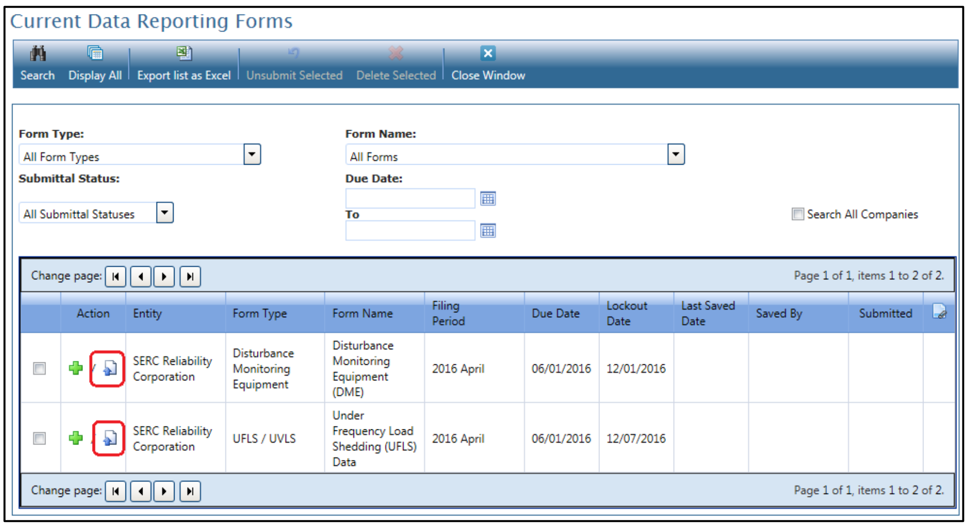


Figure 20: Current Forms screen display

Forms with a dedicated search screen

The icon is displayed in the Search results menu bar for continuously open forms (e.g., Transmission Additions & Changes).

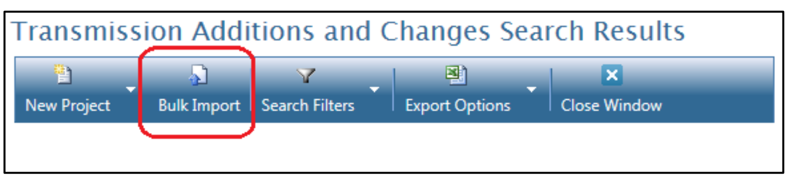


Figure 21: Form search results screen display

Clicking the icon opens the XML Import Search results screen, which lists all previous bulk uploads for the selected form type. The user clicks New Upload in the menu ribbon to continue the bulk upload process.

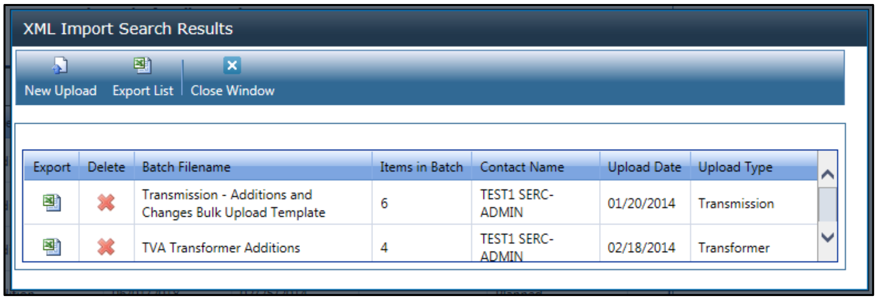


Figure 22: XML Import Search Results dialog box

6.2 Executing the bulk upload feature

Follow these steps to execute a bulk upload:

1) Click on the icon or link described in the previous section, to display the Bulk Import/Upload dialog box.
2) Click the **Upload Type** link and select the data type for the import.

Figure 23: Bulk Import/Upload selection dialog box

3) After selecting the upload type, the **Upload Type** field populates and the **Upload File** selection field displays.

Click the **Select File** button to search for a file using Windows Explorer.

Figure 24: Upload File selection

When the file is selected, the bulk upload process begins immediately.

a) If the file passes the validation requirements, the system displays the number of records processed and a message that the upload is successful.

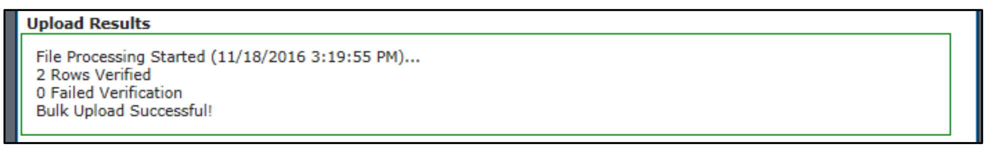


Figure 25: Successful Bulk Upload

b) If the file fails the validation requirements, the system displays each error and a message that the upload failed.

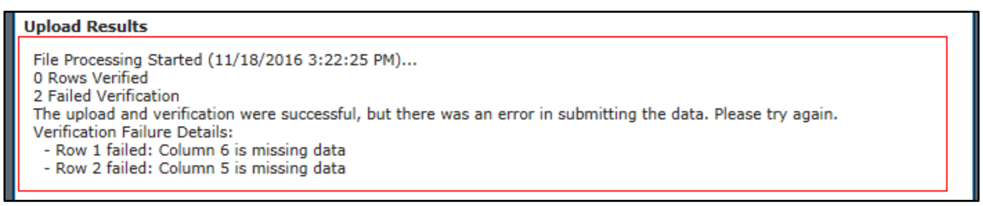


Figure 26: Failed Upload Attempt

Click **Close Window** to return to the previous page in the portal.

7.0 Attachments Manager

You have the option of including one or more related files with any form submitted using the SERC Reliability Data Reporting Portal. The form must be in a **Saved** status before an attachment can be added.

When you click the Attachments icon on the form menu ribbon, the **Manage Attachments** dialog box displays.

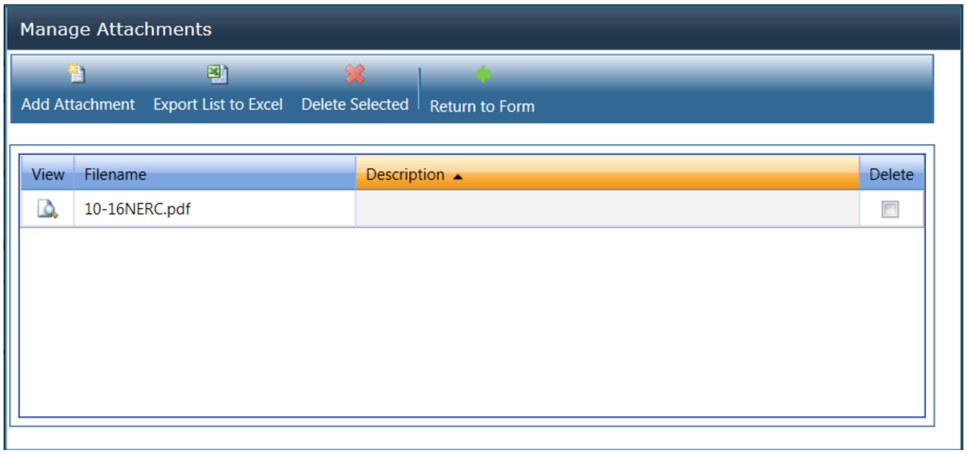


Figure 27: Manage Attachments Dialog box

The following controls are available on this dialog box:

Return to Form	Click **Return to Form** in the menu bar to close the **Manage Attachments** dialog box.
Delete Selected	To delete an attachment, check the box on the right side of the file entry, then click **Delete Selected** in the menu bar.
Add Attachment	Click the **Add Attachment** link to display the **Upload Attachment** dialog box.

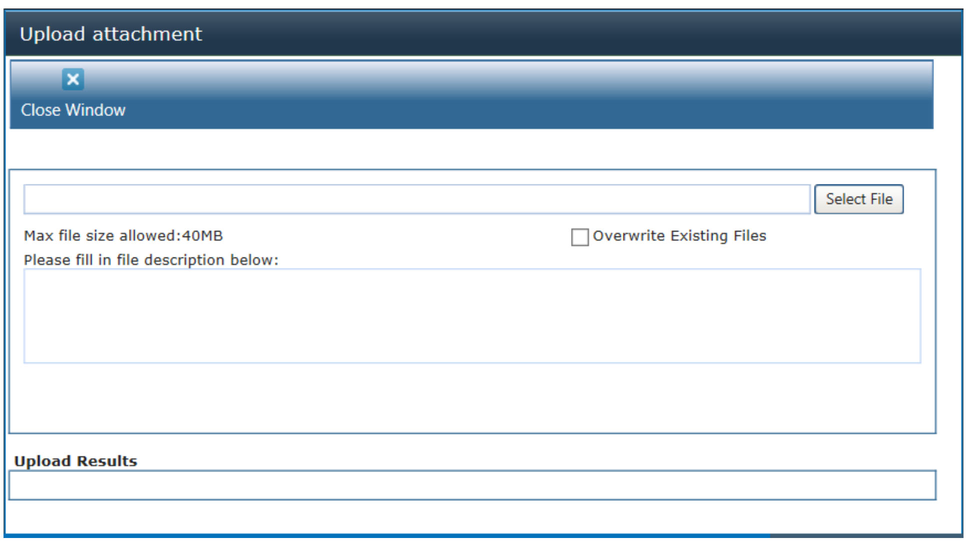


Figure 28: Upload Attachment Dialog box

Follow these steps to upload an attachment:

1) Click the **Select File** button to select your file using windows explorer. As soon as you select the file, the upload begins.

2) Wait for the upload confirmation, then click **Close Window** in the menu bar.

8.0 Reporting Form Menu Ribbon

Each Reporting Form includes these tools in the menu ribbon:

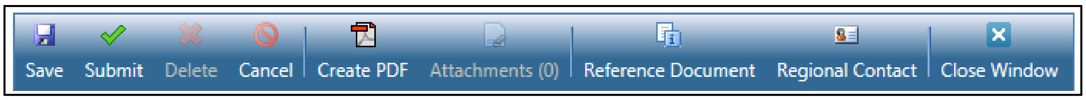


Figure 29: Reporting Form Menu Ribbon

Save	Saves the data entered on the form and leaves the form in a Read-Write state.
Submit	Saves the data entered on the form and leaves the form in a Read-Only state. To update a submitted form, contact SERC staff at rastaff@serc1.org with a request to unlock the form.
Delete	Clears all data from the form and leaves the form in a new, Read-Write state.
Cancel	Clears all recent (unsaved) changes and returns the form to its previously saved (or new) state.
Create PDF	Creates an image of the form in PDF format.
Attachments	Opens the Manage Attachment dialog to view, delete, or add attachments. The form must be in the Saved state to enable this option.
Reference Document	Provides a link to further instructions or documentation for the form. (This option may not be available on all forms.)
Regional Contact	Opens a blank email addressed to the SERC staff contact for the form. Hover over this link to view the contact name, telephone, and email address for the SERC staff contact. (This option may not be available on all forms.)
Close Window	Closes the form and returns to the Current Data Reporting Forms search results screen.

9.0 SERC Staff Contacts

If you have a question about the SERC Reliability Portal, email *rastaff@serc1.org* or contact the SERC office at (704) 357-7372.

10.0 Revision History

Revision	Date	Originator	Comments
0	January 31, 2017	Teresa Glaze	
1	January 21, 2019	Teresa Glaze	Annual Review