# **User Guide for REP User**

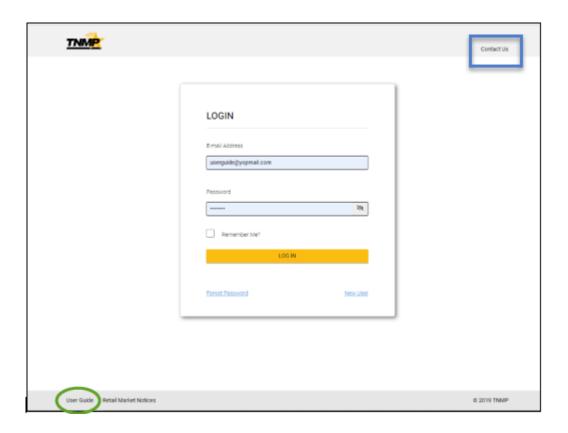
# Home Page

This document will cover the features and functions of the REP-Portal site. The features on this site include the following:

- User Guide provides instructions for use of website and available features
- Contact Us provides instructions on how to contact TNMP support for questions about the site
- Retail Market Notices provide listing of past Retail Market notices sent by TNMP
- LOGIN provides access for existing registered users
- New User provides for new user registration
  - First time Log In
- Forgot Password provides a method to reset a registered users password
- Home Page
  - o My Profile
  - o Premise Search
  - On Demand Read
  - Tampering
  - SafetyNet
  - Reports
  - o Request LOA
  - o ESI ID Look Up
- Valid device listing review for list of compatible device / OS / browsers combination

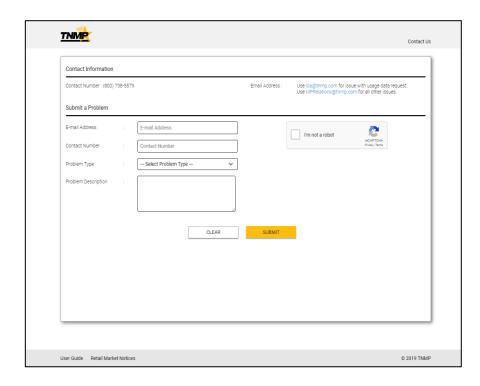
### **USER GUIDE:**

Below is a screenshot of the LOGIN start page. On this page you will find a link on the bottom left corner for access to the User Guide. The User Guide is a document with step by step instructions on how to use the REP-Portal site.



#### **CONTACT US:**

Also contained in the LOGIN start page screen shot above is the link to the Contact Us page. Clicking on the Contact Us link will open the Contact Information Page.



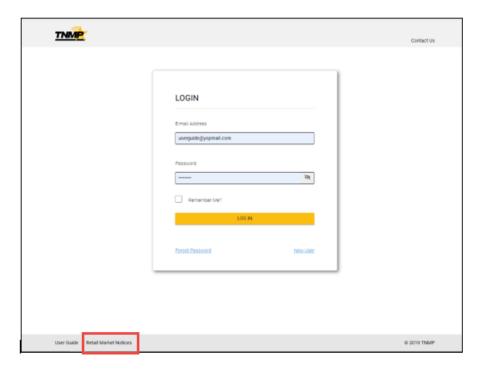
This new page displays two different sections. The top section provides phone numbers that can be used to reach the support team. This section also provides an email address where you can send questions to directly.

The lower section of the screen can be used to send the support team an email directly from the web page. There are a few required inputs to complete this action.

- Email Address
- Contact Number
- Problem Type
- Problem Description
- Select "I'm not a robot" check box

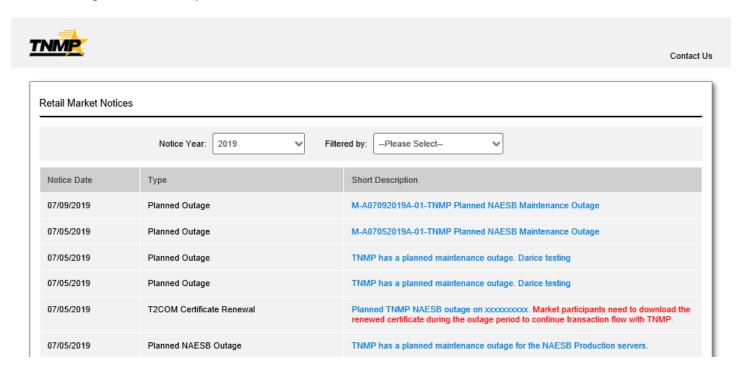
Finally, clicking on the "SUBMIT" button will submit your query to TNMP.

#### **Retail Market Notices**

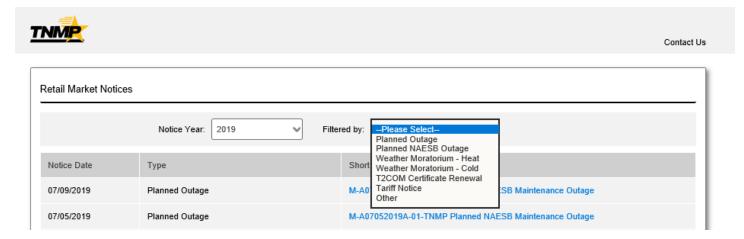


The LOGIN start page also has a Retail Market Notices link. Selecting this link will open a web page and display all past Market Notices sent by TNMP. Use of this function does not require user log in.

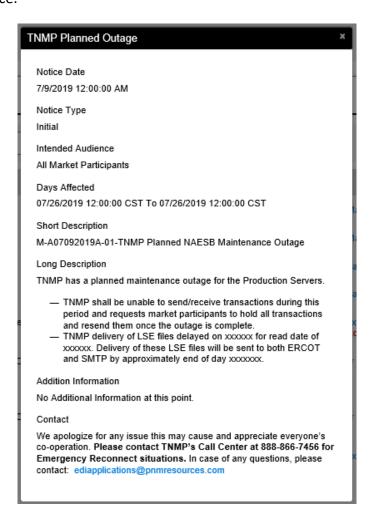
The following screen shot represent the default view.



The screen can be filtered by year and Market Notice type.

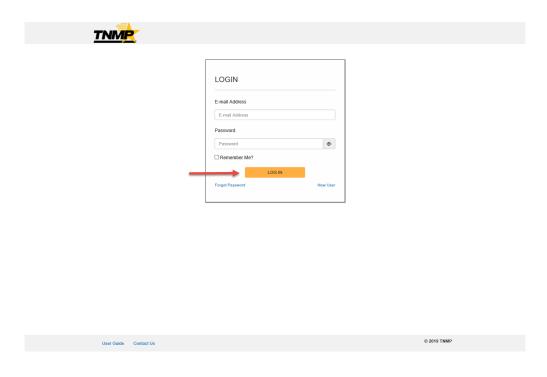


Finally, selecting the blue text in the Short Description will open a window and present additional detail related to the Market Notice.

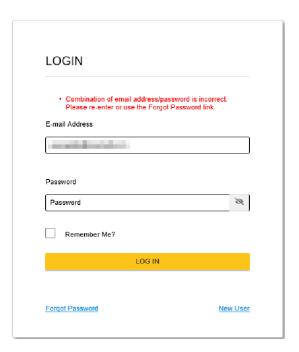


### LOGIN:

Continuing the LOGIN start page you have the "Log in" function. This feature is intended to work for registered users. This function requires the user to enter a valid Email Address and Password. With a valid Email address and password, when the user clicks on the "Log in" they will be taken to the REP-Portal site home page.

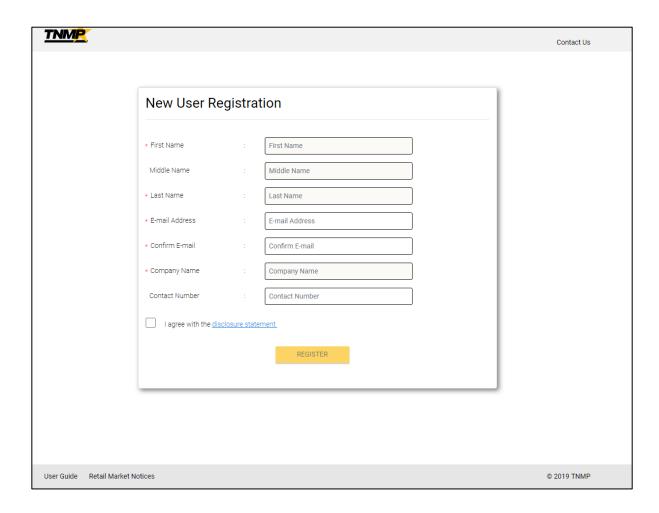


If the user enters an invalid Email Address or an invalid password, they will get a warning message as demonstrated in the red text below.



#### **NEW USER:**

The next feature on the LOGIN start page is the New User link. Selecting this link will navigate the users to new user registration page for account creation. See screenshot below.



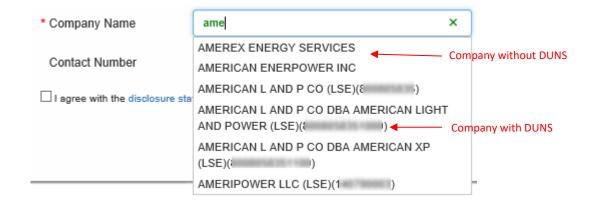
The New User Registration page requires the following inputs:

- First Name
- Last Name
- Email Address
- Confirm Email Address
- Company Name
- Checking "I agree with the disclosure statement"

After the first 3 characters are entered in the Company Name field the application will auto populate with matching Company Name for selection. If no match is present the user will need to contact the LOA support team.

#### New User Registration, cont.

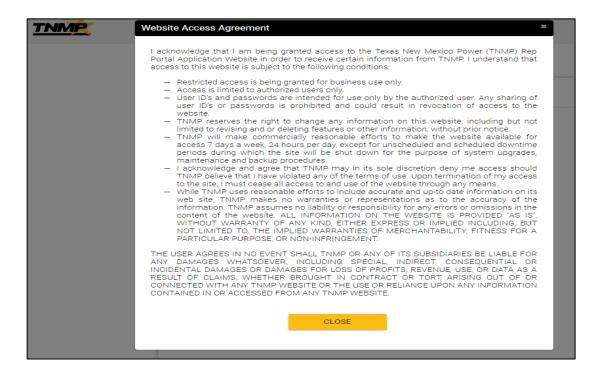
Each Company will have a DUNS number associated with it. If the new user chooses a Company without DUNS number, then that login will have only "Request LOA" option available on home screen after login.



Checking the "I Agree with the disclosure statement" check box will display the Website Access Agreement, select Close on the Website Access Agreement and then select the "REGISTER" button.

#### Website Access Agreement:

During the New User Registration process, you will be presented with the Website Access Agreement for important access information. You must agree to the Terms of Use to access any proprietary information contained within the REP-Portal site.

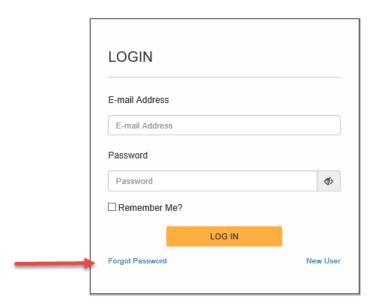


After clicking "Register" the request is submitted for review and approval. Once approved an email will be sent to the user with a link to the Login page and a One-time password.

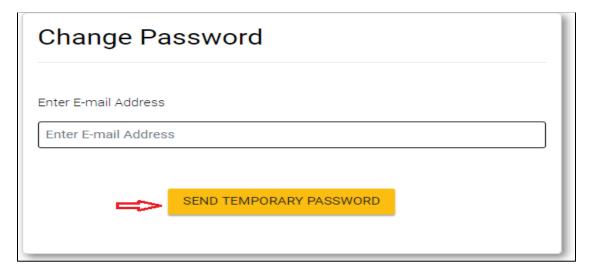
#### **FORGOT PASSWORD:**

The last feature on the LOGIN start page is the Forgot Password function. If a user cannot remember their password for this website, they can select the "Forgot Password" link. This will redirect the user to a Change Password window.





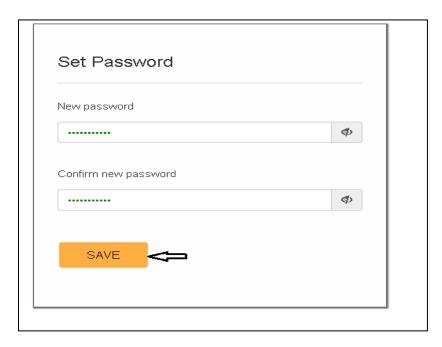
Within the Change Password window, the user will be required to enter a valid registered email and then select the "SEND TEMPORARY PASSWORD" button.



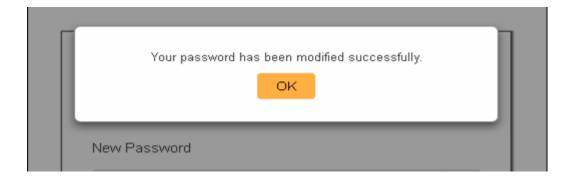
The user will then need to follow the process to enter a new permanent password.

#### FIRST TIME LOGIN:

The first time a user logs into the REP-Portal site they will be using the One Time Temporary password provided in the user registration process. The system will recognize this is as the user's first time log in and require the user to change their password. The system will automatically open the Set Password page as displayed below.



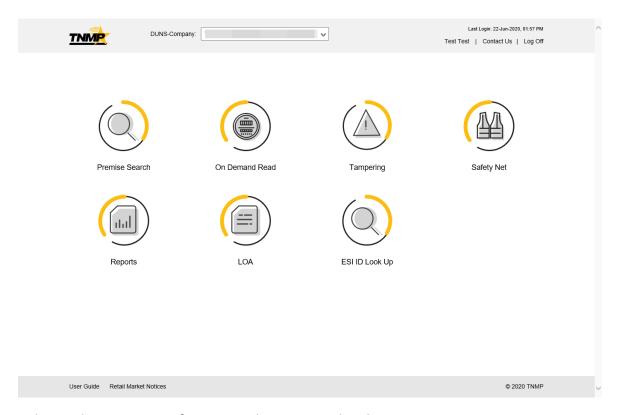
Once the user enters a new password in the "New password" section and the "Confirm new password" and selects SAVE, they will receive the following pop-up message confirming the new password has been saved.



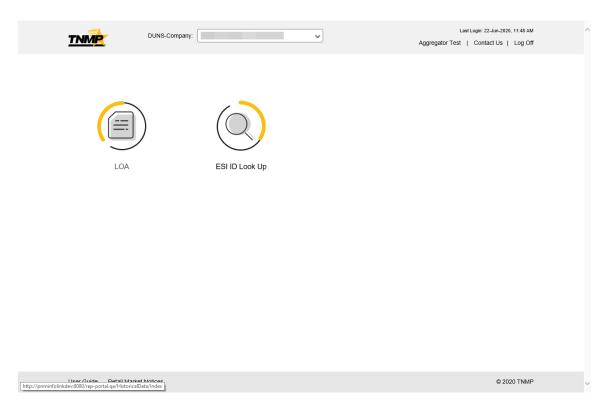
Passwords will expire on a 60-day cycle. The user will receive a system generated email 15 days prior to expiration prompting the user to update their password. If the password is not changed by the expiration date the user id / password combination will get an error when attempting to log on. The user will be required to select the forgot password function to reset their password.

# **Home Page**

As you can see in the screenshot below, the Home Page for a REP user has 7 main functions.

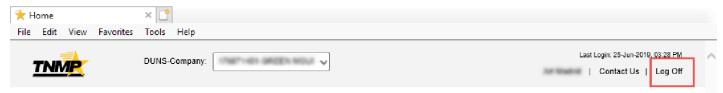


Below is the Home Page for a user who registered with company who does not have a DUNS number associated in TNMP system. This scenario typically applies to an Aggregator or Power Broker registered for LOA access only.



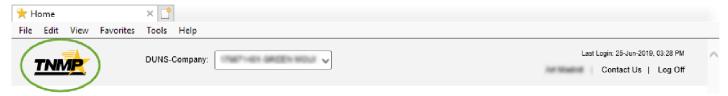
#### Home Page, cont.

### Log Off:



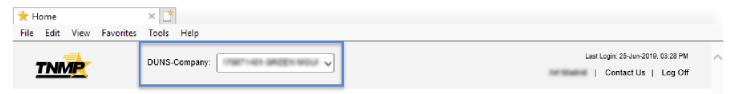
The first feature to review is the "Log Off" function. This feature does exactly what it states – when selected the user is logged out of the application.

#### **TNMP LOGO:**



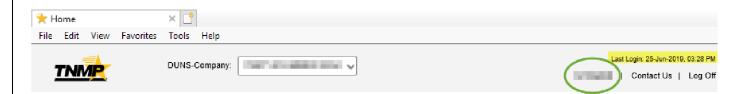
The second straight forward feature is carried throughout all remaining webpages. This feature is tied to the TNMP Logo. Selecting the TNMP log will return the user to the home page as displayed above.

#### **Duns Company:**



The DUNS-Company selection box is for those companies that have known affiliated companies in the market. The company name affiliation is strictly correlated based on DUNS number hierarchy. The drop-down function will display additional linked company names and allow users to select one for data viewing. The default company name displayed will be the company name the user selected while registering.

#### **Username:**



The top right side of the screen displays the key information. The top line displays the Last Login Date of the user currently logged in to the system. The second line consists of the Username | Contact Us | Log off functions. Clicking on your name will take you to the Personal Information page as shown on the next page.

### Home Page, cont.

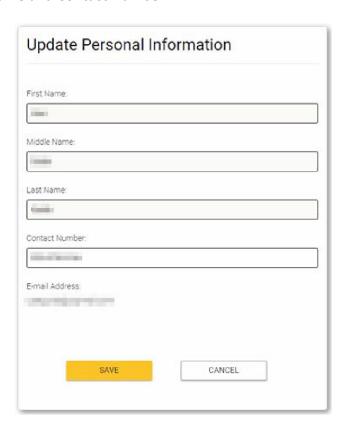
#### **Personal Information:**

In the Personal Information window, you can select Change Password or Edit Profile. If you select the Edit Profile button the user is taken to the Update Personal Information pop-up. Here the user can change their password and edit their profile.



#### **Edit Profile:**

When a user selects the "Edit Profile" button the Update Personal Information pop-up window is presented. Within this new window the user can update personal information including: First Name, Middle Name, Last Name and Contact Number.

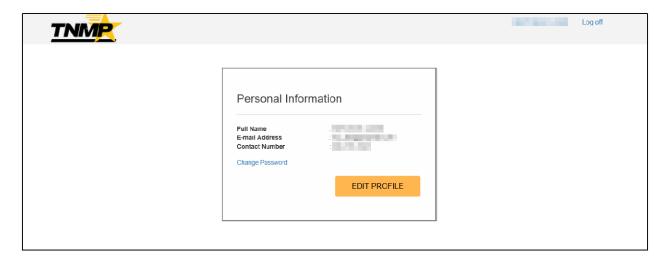


Selecting "SAVE" commits the updates to the application and the user is taken back to the Personal Information pop-up window with the new information applied.

### Home Page, cont.

### **Change Password:**

Within the Personal Information pop-up window, the user is also presented with the ability to change their password. This is achieved by selecting on the blue "Change Password" link.



Selecting the "Change Password" link will open a new pop-up window as shown below. The user would enter a new password and confirm the new password in the associated entry boxes. The last step would be to select SAVE.



### **TNMP Premise Search**

Clicking the premise search icon in the home page will navigate the user to the Premise Search page.

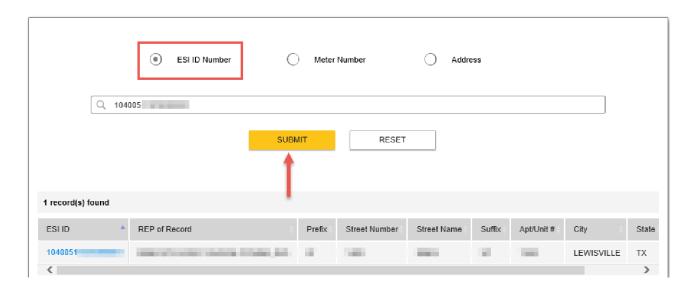


This function allows the user to search for premises based on ESI ID, meter number or Address. Remember, this search is focused on the selected DUNS-Company (in header). By default, this will be populated with the Company info selected in the registration process.



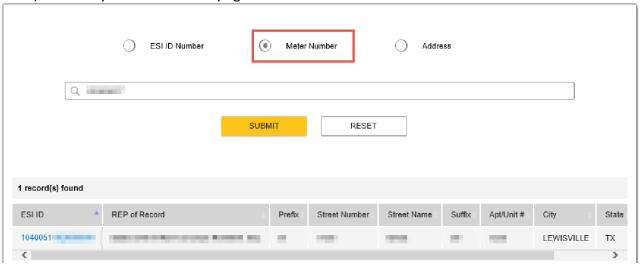
### Search by ESI ID:

The user enters a valid ESI ID number and clicks on the Submit Button. The search result will display the details of the matching ESI ID. Including - prefix, street number, street name, suffix, apt/unit, city, state, zip. Selecting the ESI ID result (blue text) will take you to the details page.



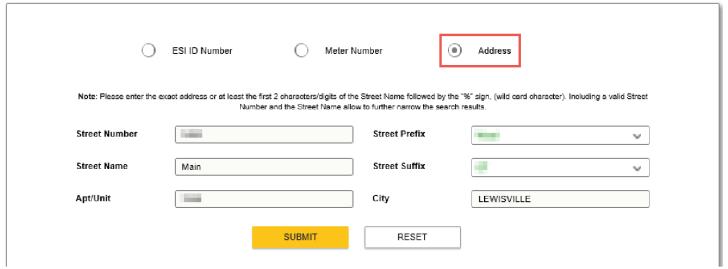
#### **Search by Meter Number:**

The user enters a valid Meter number and clicks on the Submit Button. The search result will display the details of the matching Meter number. The screen will display the associated ESI ID, CR of record, prefix, street number, street name, suffix, apt/unit, city, state, zip. Selecting the ESI ID result (blue text) will take you to the details page.



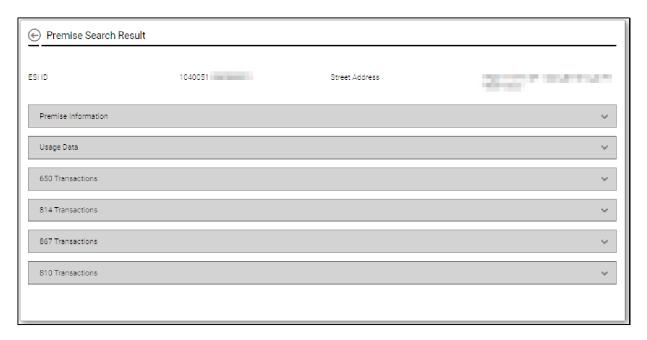
### **Search by Address:**

The user enters a valid Address or parts of the address (wild card selection) and clicks on the Submit Button. The search result will display the details of the associated ESI ID such as CR of record, prefix, street number, street name, suffix, apt/unit, city, state, zip. Selecting the ESI ID result (blue text) will take you to the details page.

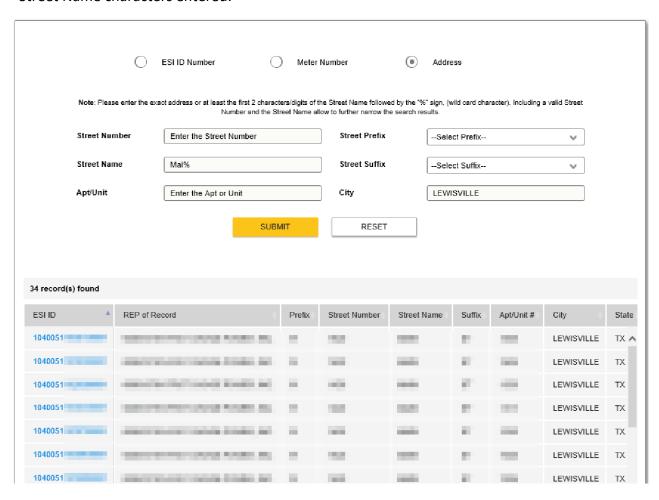


Clicking on the ESI ID from the Premise Search Result will navigate to the Premise information page.



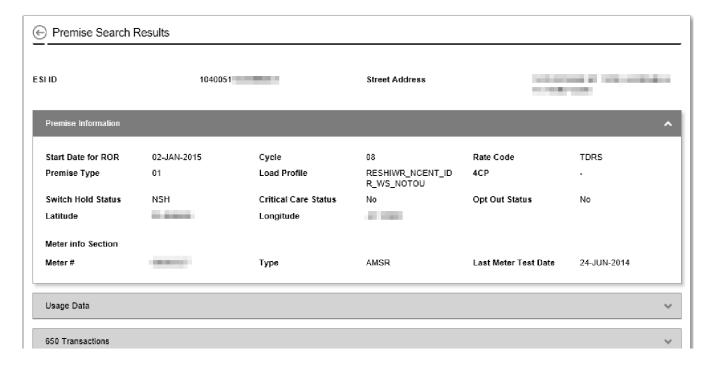


Using the wild card character "%" in the street name will return a list of all ESI IDs with the matching Street Name characters entered.



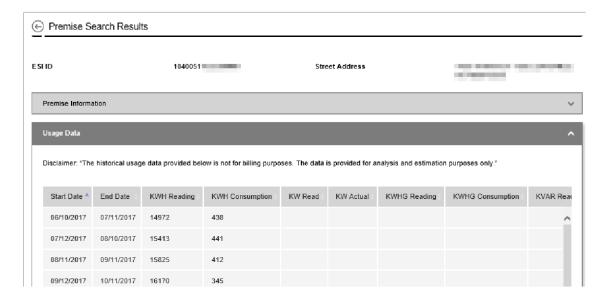
#### **Premise Information:**

This tab displays key information related to the premise including: Start Date of ROR, Cycle, Rate Code, Premise Type, Load Profile, 4CP, Switch Hold Status, Critical Care Status, Opt Out Status, Latitude, Longitude. It also contains the Meter information such as Meter number, Type, Last Meter Test Date.



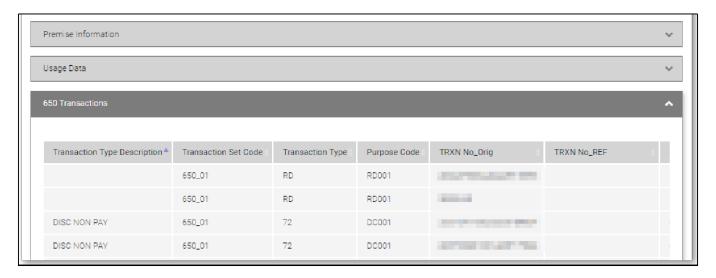
#### **Usage Data:**

The Usage Data tab displays the Historical Usage data for the ESI ID in a tabular format. The usage data contains the following fields: Start Date, End Date, KWH Reading, KWH Consumption, KW Actual, KW Billed, KWHG Reading, KWHG Consumption, KVAR Reading, KVAR Consumption, TDSP Charges.



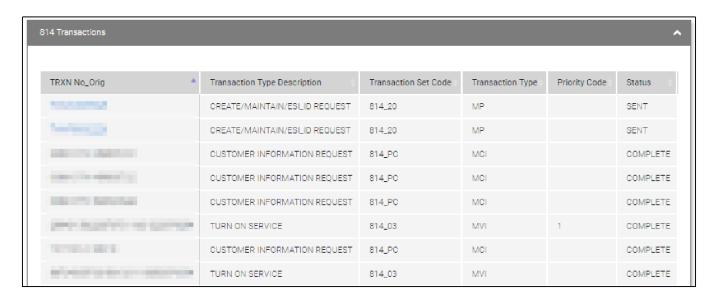
#### 650 Transactions:

The 650 Transactions tab includes details related to the ESI ID in a tabular format. It contains the following fields: Transaction Type Description, Transaction Set Code, Transaction Type, Purpose Code, TRXN No\_Orig, TRXN No\_REF, Status, Scheduled Date, Reject Code.

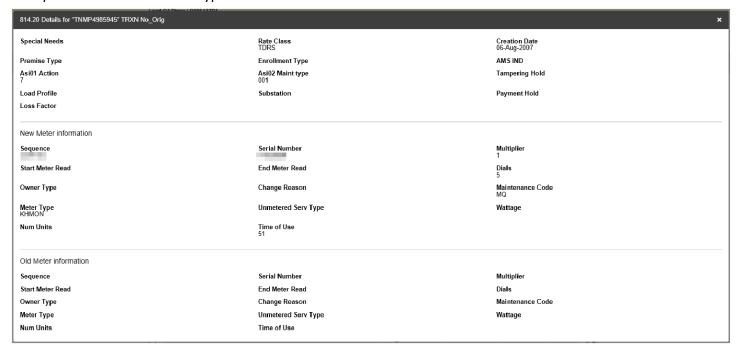


#### 814 Transactions:

The 814 Transactions tab displays detail associated to the ESI ID in a tabular format. It contains the following fields: TRXN No\_Orig, Transaction Type Description, Transaction Set Code, Transaction Type, Priority Code, Status, Scheduled Date, Completion Date, Reject Code, Response Date. Any TRX No\_Orig in blue can be selected for additional details.



The linked pop up detail will resemble the screenshot below. The various fields will be populated based on the specific 814 Transaction Type.



#### 867 Transactions:

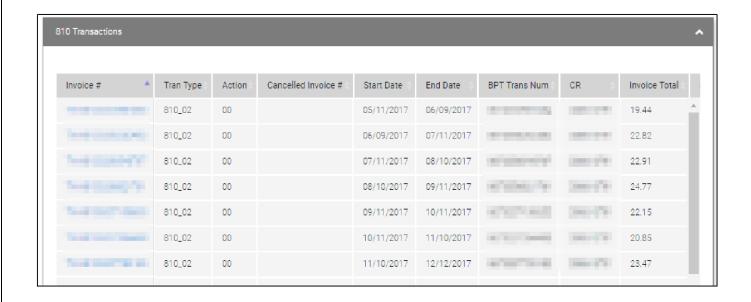
The 867 Transactions tab present detail associated to the ESI ID in a tabular format. It contains the following fields: BPT Trans Num, Tran Type, Ref TN, Cancel Date, Start Date, End Date, CR, KWH, KW, 824 Code, 824 Reason. Any BPT Trans Num in blue can be selected for additional details as shown in the second screenshot below.





#### 810 Transactions:

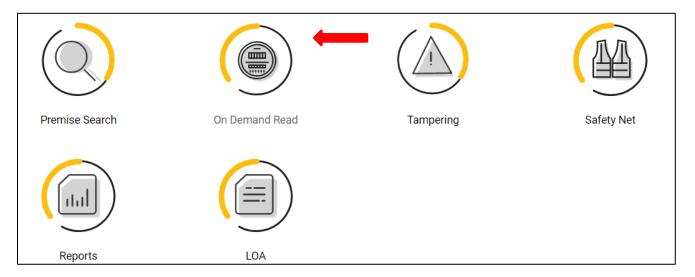
The 810 Transactions tab presents detail associated to the ESI ID in a tabular format. It contains the following fields: Invoice #, Tran Type, Action, Cancelled Invoice #, Start Date, End Date, BPT Trans Num, CR, Invoice Total. Any Invoice number in blue can be selected for addition details as shown in the second screenshot below.



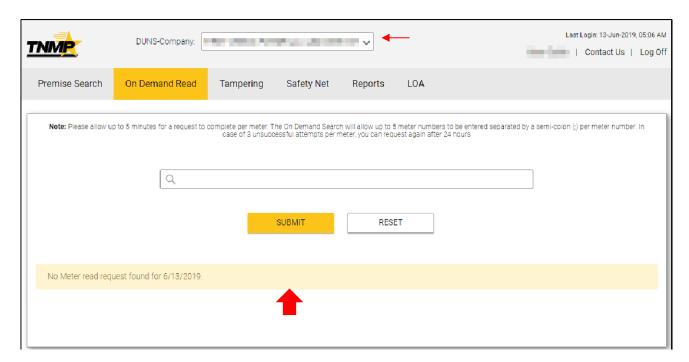


# **On Demand Read**

Clicking the On Demand Read icon in the home page will navigate the user to the On Demand Read page.



This function allows the user to request On Demand Read for AMS meters.

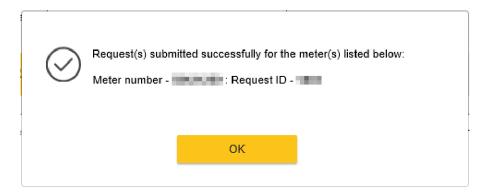


User can request up to 5-meter numbers separated by semi-colons.

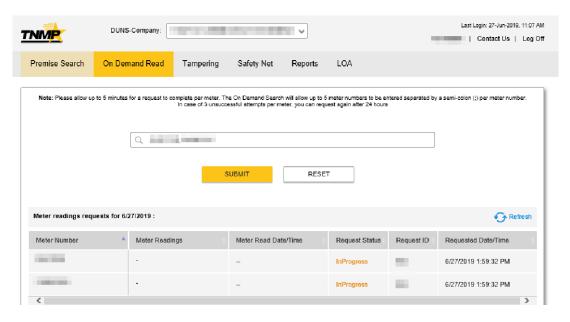


#### On Demand Read, Cont.

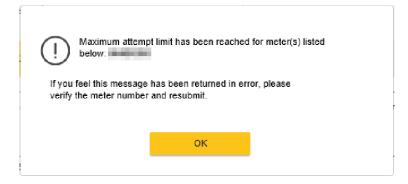
When the user clicks "SUBMIT" they will get an acknowledgement message to let them know the request has been submitted.



The system will return a status grid with all requests made for the day.



There is a limit of 3 requests per meter per day. When this limit is reached the user will get a message stating the limit has been reached.

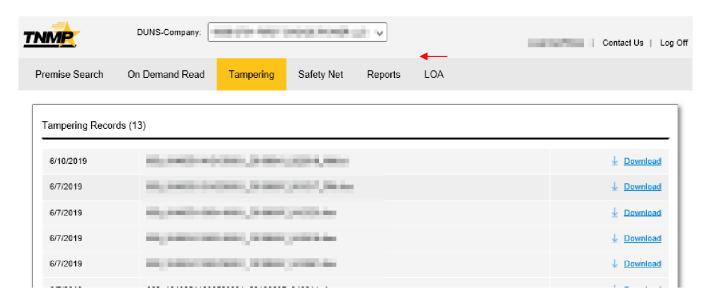


# **TNMP Tampering**

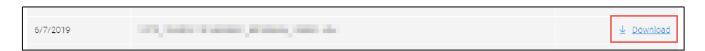
Clicking the Tampering icon in the home page will navigate the user to the Tampering page.



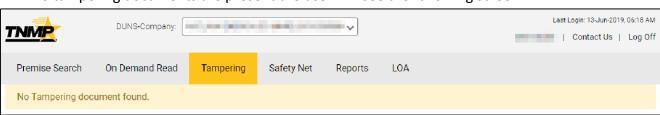
This function allows the user to view and download the tampering documents. This page will show all available tampering documents for selected DUNS-Company in header drop-down.



On clicking the download link, the tampering document will be downloaded to the local drive.



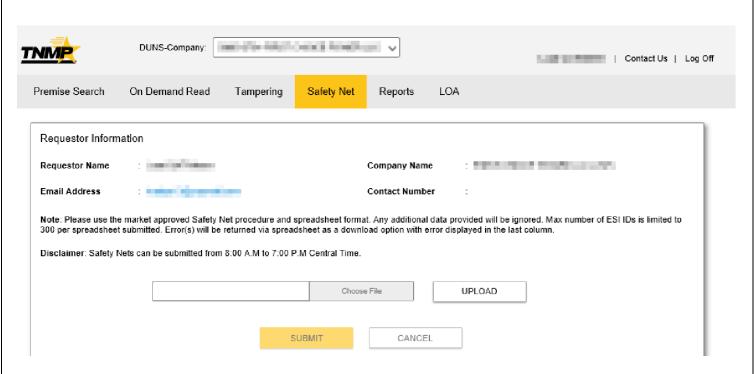
If no tampering documents are present the user will see the following screen.



# **TNMP SafetyNet**

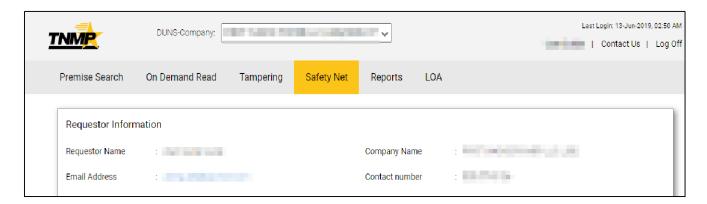


Clicking the "Safety Net" icon in the home page will navigate the user to the Safety Net page as shown below.

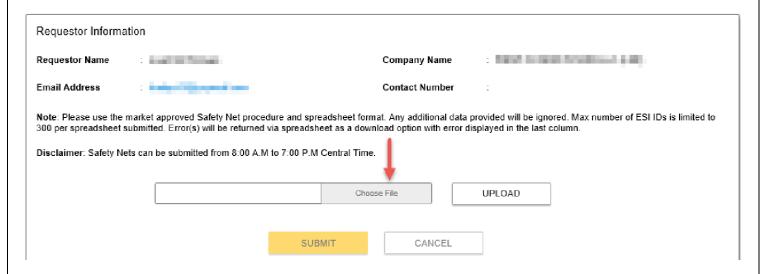


#### Safety Net, Cont.

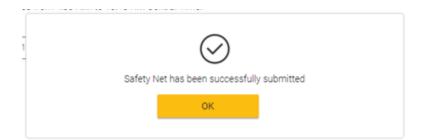
"Choose File", "UPLOAD" & "SUBMIT" buttons will only be enabled during allowed time window stated in disclaimer. Requester Information will be auto populated based on user profile.



The ERCOT provided safety net excel template must be used and completed with all the required details. User will click on "CHOOSE FILE" and select the input file from the saved location. Then click on the "UPLOAD" button to upload the spreadsheet to the web application. Once upload is successful. Click "SUBMIT" button.



After submitting the request, the user will receive a pop-up message stating "Safety Net has been successfully submitted" and Service Order(s) will be created.



### Safety Net, Cont.

If there are any validation errors in the spreadsheet a message with link to download error excel will appear at the bottom of the screen. The last column in each row will have error details for that row. If any of the submitted records are not present that means that record has been processed successfully.



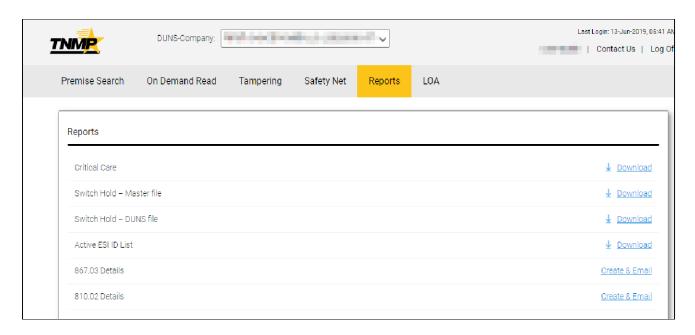
# **Reports**



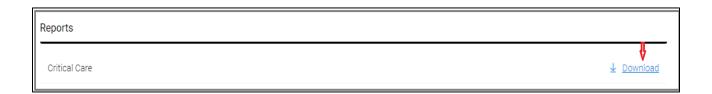
Clicking on the Reports link on the homepage will take the user to the detailed Reports page.

The user will see the following reports: Critical Care, Switch Hold – Master file, Switch Hold – DUNS file, and Active ESI ID list. These reports are available for immediate download.

The 867.03 Details, 810.02 Details reports are available for selection to be emailed to the user after the fact.



Clicking the download link will cause the selected report to download to the active window on the user's computer.

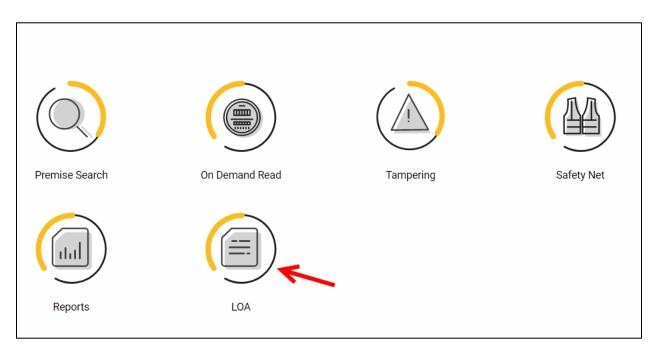


When a user selects the "Create & Email" link for the 867.03 Details or 810.02 Details, a back-ground process will run to create the report. The report will be emailed outside of the active Rep Portal session. The report will include the last 30 days of activity for the DUNS-Company number listed in the drop-down selection box.

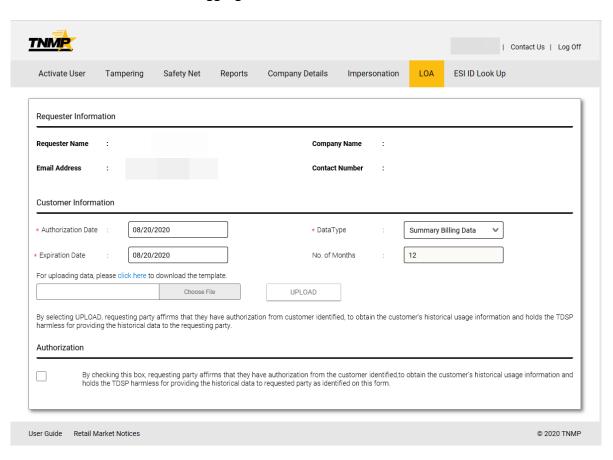


### **TNMP LOA Page**

### **Request LOA:**



Clicking on the "LOA" icon will direct the user to the detailed LOA request page as shown below. This link is available for both REP and Aggregator users.



#### Request LOA, cont.

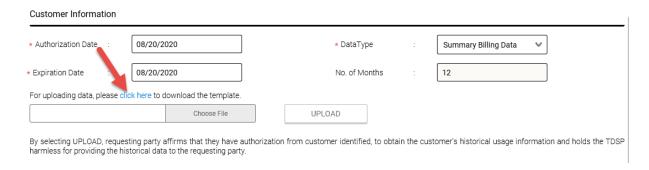
1. Requester Information will be auto populated based on user profile.

Requester Information												
Requester Name	:		Company Name	:	No. 100 (100 (100 (100 (100 (100 (100 (100							
Email Address	:		Contact Number	:	1000.00							

2. User will need to complete the Customer Information section.

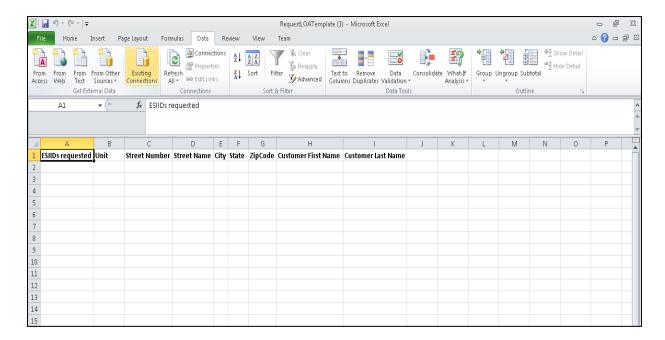
* Authorization Date :	08/20/2020	* DataType :	Summary Billing Data 🔻
* Expiration Date :	08/20/2020	No. of Months :	12
For uploading data, please cli	ck here to download the template.		
	Choose File	UPLOAD	
	ting party affirms that they have auth torical data to the requesting party.	orization from customer identified, to obtain the o	customer's historical usage information and holds the TD

3. Selecting "click here", as shown below, downloads the LOA Request Data input template to the user computer.

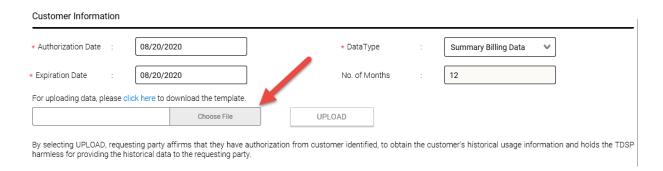


- 4. Below is a screenshot of what the template looks like. The user will need to complete the mandatory fields within the template. The mandatory fields are ESI ID, Street Name, City, State, Zip Code and Customer Last Name.
- 5. If non-mandatory fields are entered, they must match exactly, so if in doubt leave blank
- 6. Enter business entity name in Customer Last Name field and leave first name field blank
- 7. Do not use special characters (i.e. ', . , &, # ......) in the spreadsheet
- 8. Do not use special characters in the file name when saving to computer
- 9. Do not change template field types
- 10. Abbreviate generic Street Names (i.e. Highway HWY, County Road CR ...)

#### 11. If available validate address with ERCOT site

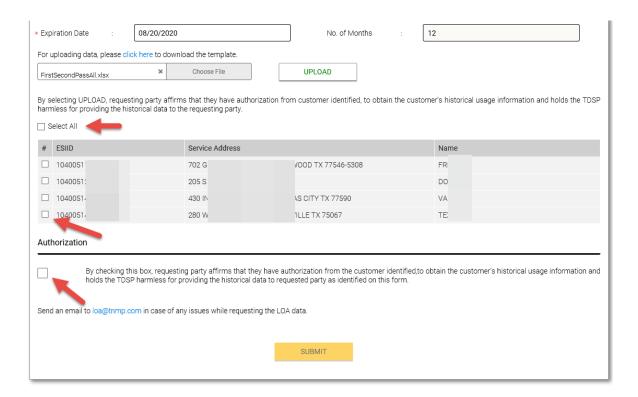


- 12. Within the template the user would need to save the file to the computer noting saved location.
- 13. Back in the web application the user will click on "CHOOSE FILE" and select the input file from the saved location.



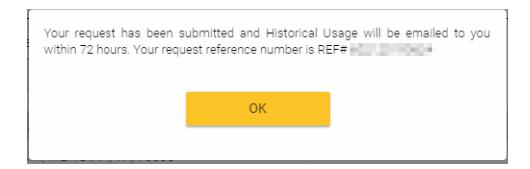
14. The user will then click on the "UPLOAD" button to upload the spreadsheet to the web application. The primary acknowledgement has been added below the UPLOAD section "By selecting UPLOAD, requesting party affirms that they have authorization from customer identified, to obtain the customer's historical usage information and holds the TDSP harmless for providing the historical data to the requesting party."

15. If all activity is successful a Grid will display with resulting data pull. The user will need to select the specific records desired or select all. The page will present the full ESI ID, Full Address and first 5 characters of the associated customer name contained in the CIS.



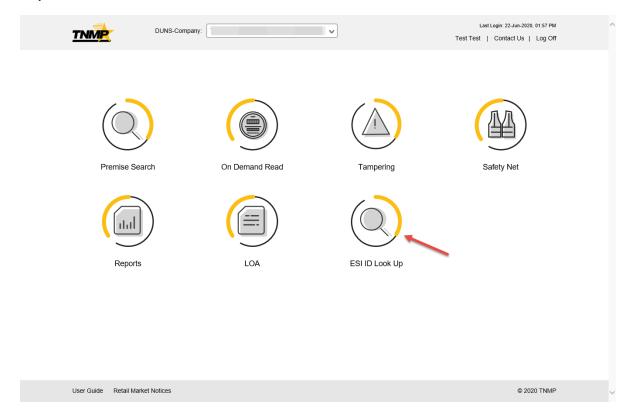
- 16. The user must select the Authorization check Box agreeing to the statement confirming responsibility and permission to customer data.
- 17. Finally, the user would select "Submit" to complete the request.

After submitting the request, the user will receive a pop-up message stating "Your request has been submitted and Historical usage will be emailed to your registered email address within 72 hours. Your request reference number is XXXXXXXX.

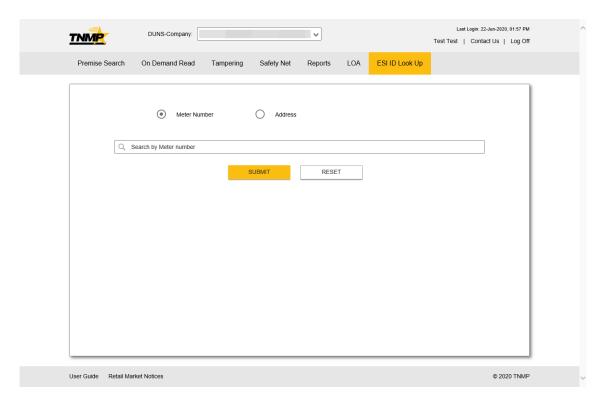


Once the request has completed processing an email with the requested data will be sent to the email address on the requester profile.

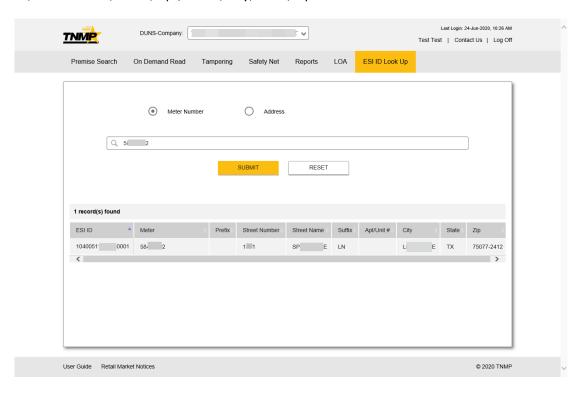
### **ESI ID Look Up**



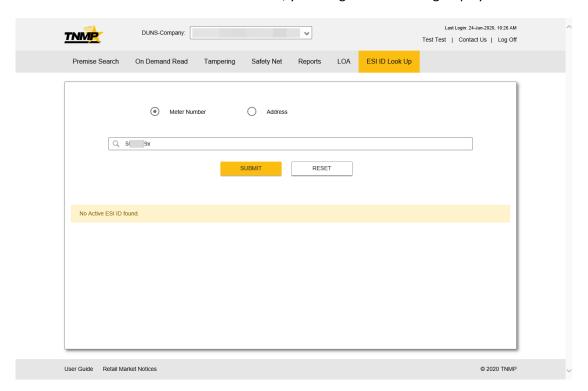
Clicking on the "ESI ID Look Up" icon will direct the user to the detailed page where the user can look up an ESI ID with a Meter Number or a partial address. This link is available for both REP and Aggregator users.



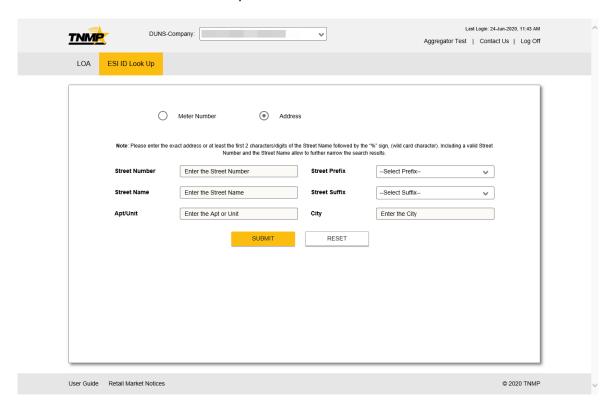
Enter a valid Meter number and the system will present the following fields – ESI ID, Meter, Prefix, Street Number, Street Name, Suffix, Apt/Unit #, City, State, Zip.



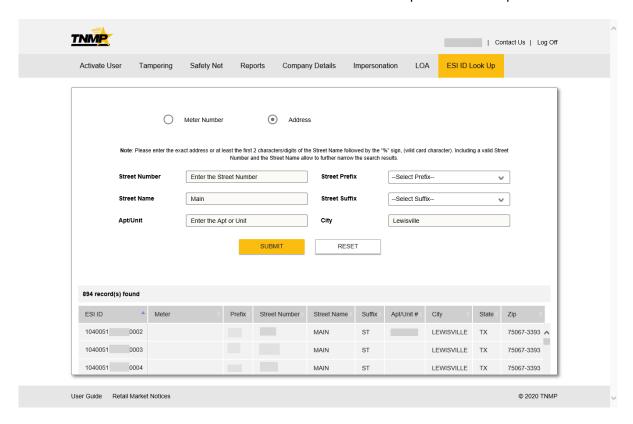
If there is no match for the meter number entered, you will get the following display.



The second option is to enter either a full address or partial address. The Street Name field must have a minimum of 2 characters entered. The system will



Wild card entries will retrieve all records that match the entered request. See example below.



# **Valid Device listing**

The listing below represents the various device types / browsers / operating systems the application has been fully validated on. If you encounter any errors, please ensure you are compliant with these minimum requirements before contacting the support team. Finally, this site requires JavaScript to be enabled to work properly.

			Internet Explorer		Microsoft Edge		Safari		Chrome			Mobile Safari				Chrome Mobile			
	Hardware	0.5.	10	11	17	18	11	12	70	71	72	10	11	11.4	12	63	70	72	
•	٧	Vindows 10	X	X	х	х	÷	*		X	х								
Desktop		Windows 7	x	-	-	-	-	-53	X	-	-								
	Macintosh10.13		14	-	-	-	X	+:	*	-	*								
	Macintosh10.14		-	-	- 1	15	-	x	-	-	-								
Tablet	iPad, 6th Gen	iOS 11.4						T.				*	- 12	х	-	154	3		
	iPad Pro	iOS 10.2										x	-	-	:::	:	-		
	Nexus 9	Android 6.0											9	20	( <b>+</b> )	х	- 23	-	
Mobile	iPhone XS Max	iOS 12.1										-		33	х	2	- 5	-	
	iPhone X	iOS 11.4										-	12	x	040	-	-		
	iPhone 7	iOS 10.1										x	-	-	8.50	-	-		
Š	Google Pixel 3	Android 9.0										2.5	2			G.	2	x	
	Galaxy S8	Android 8.0										30				27	X		
	Nexus 6P	Android 7.0										्र	9	_ S	148	10	x		