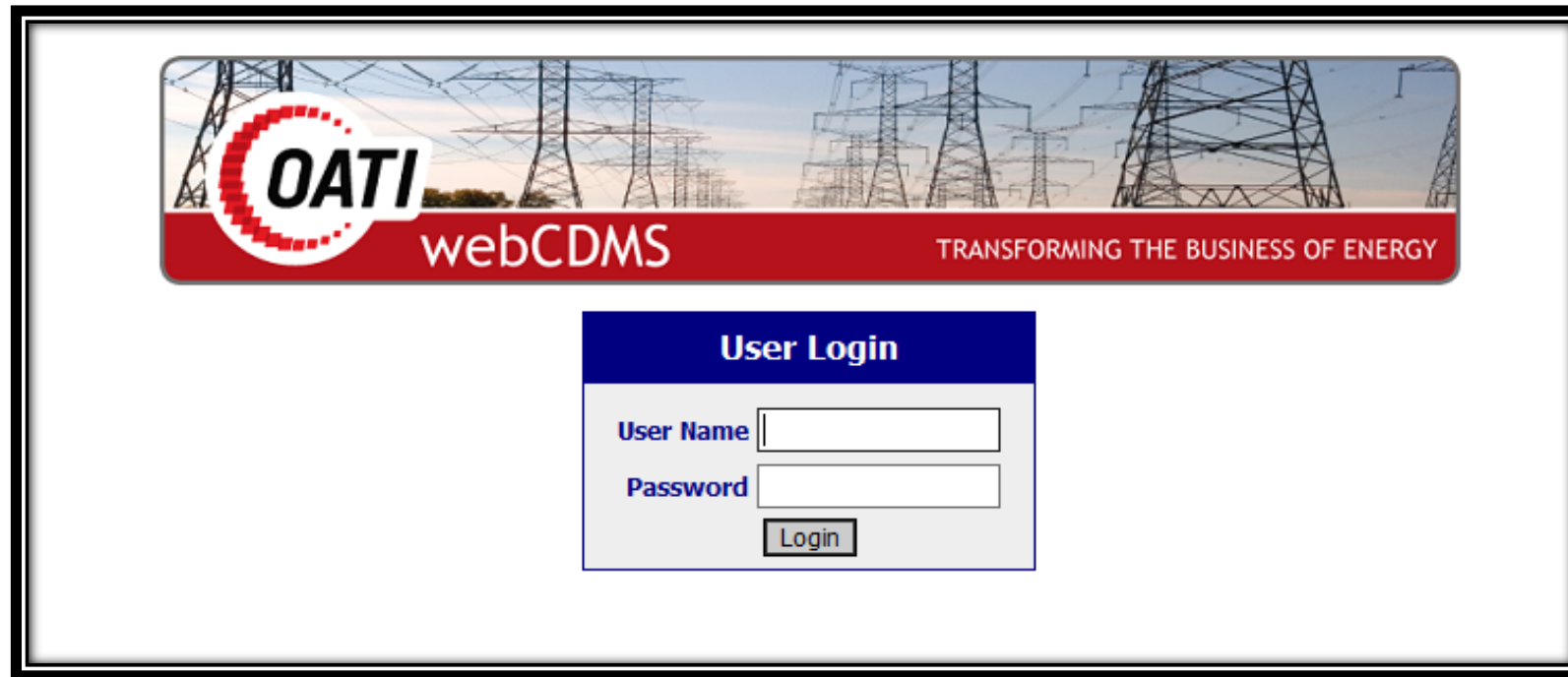


# Entity Function Mapping in webCDMS

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# Entity Function Mapping Navigation

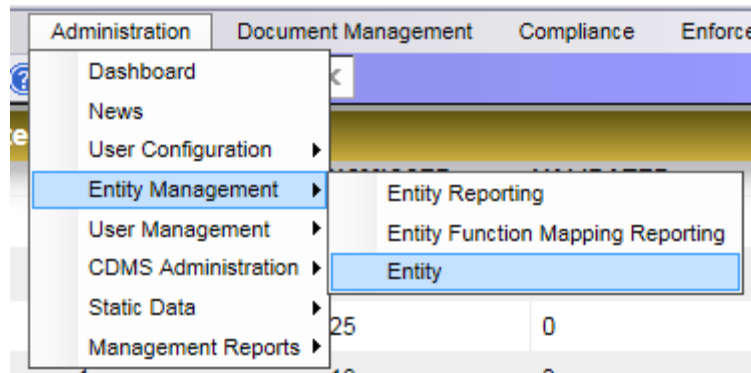
**Log in to webCDMS to complete the Entity Function Mapping.**



The screenshot displays the login interface for webCDMS. At the top, there is a banner with the OATI logo on the left, the text 'webCDMS' in the center, and the slogan 'TRANSFORMING THE BUSINESS OF ENERGY' on the right. Below the banner is a 'User Login' form. The form has a blue header with the text 'User Login'. It contains two input fields: 'User Name' and 'Password'. Below the 'Password' field is a 'Login' button.

# webCDMS Path To Entity Function Mapping

Once logged in to webCDMS, the path to follow is: Administration, Entity Management, and Entity.



# Entity Function Mapping

Within the Entity screen,  
under the Code column,  
select the acronym in blue font.

**Entity** Region: **Texas Reliability Entity, Inc. (TRE)** Entity Name Containing: **def** NERC Defined: **Yes**

Code	Regional Code	Entity	NERC ID	Compliance Jurisdiction	Type
<b>YEN</b>	Your Entity Name	YEN (YEN)	NCR99999	United States (1)	Registered Entity

08/03/2016 15:00:57 CPT

# Entity Function Mapping

To proceed, select  
“Entity Function Mapping”  
located on the menu to the left.

Include in NERC Update:

Active:

\*Type: Registered Entity

\*Name: Your Entity Name

NERC ID: NCR99999

\*Code: DEF

Regional Code: DEF

\*Is Registered?: Yes

Entity Function Mapping

\*Address 1: 1234 First Street

Address 2:

\*City: Austin

\*State/Province: Texas

\*Compliance Jurisdiction: United States (1)

\*Zip/Postal Code: 77777

\*Phone: 555 - 555 - 5555

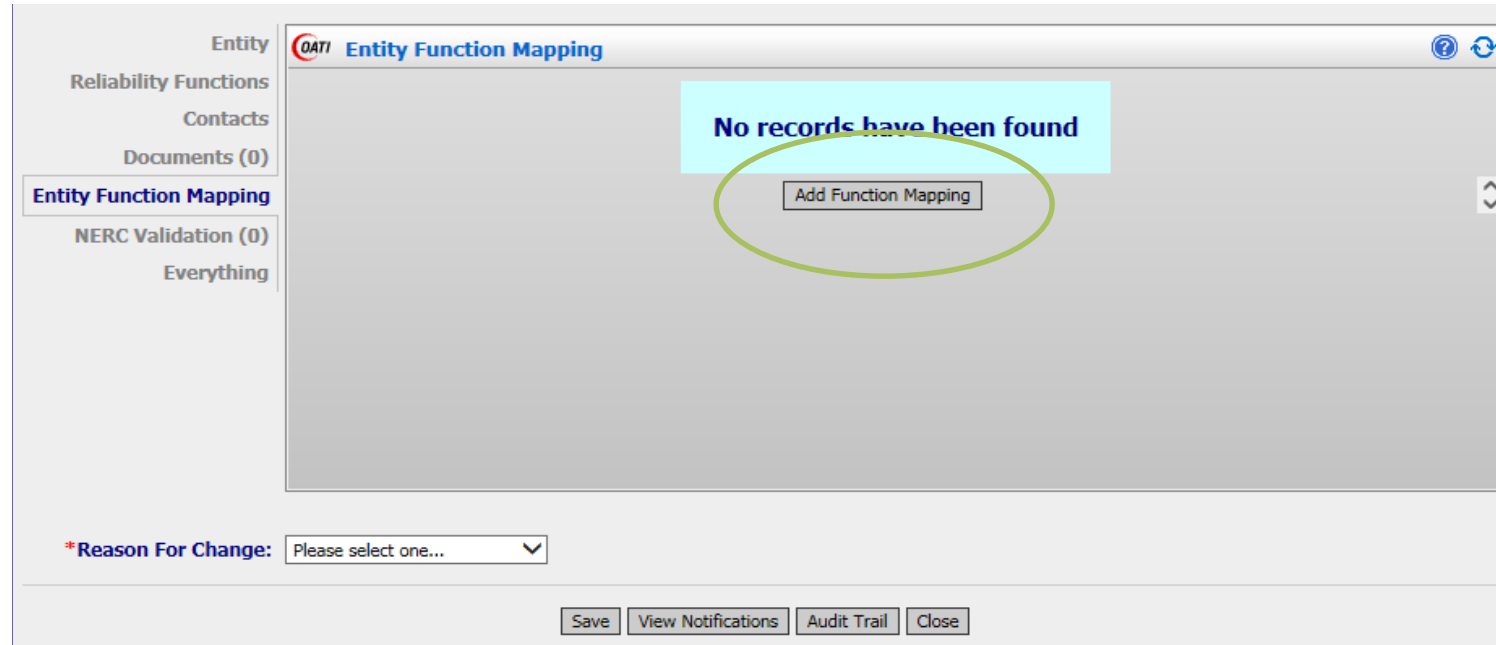
Fax: - -

Decryption Password: (This password is used when sending encrypted files via email)

Entity Profile:

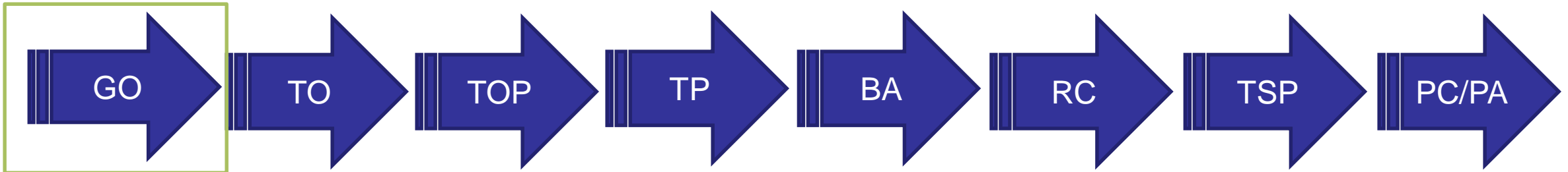
Region Comment:

# Entity Function Mapping



Select "Add Function Mapping," located in the middle of the Entity Function Mapping screen.

# Entity Function Mapping - GOP Registration



Map the registered function Generator Operator (GOP) to a Generator Owner (GO).

Select GOP in the “Mapped Functions” field. Use right arrow to move the function from the “Available” field to the “Selected” field.

All registered functions will need to be mapped to complete the mapping process.

NERC Defined:

\* Mapped Functions:

Available	Selected
	Generator Operator (GOP)

\* Mapped To Functions:

Available	Selected
Balancing Authority (BA) Generator Owner (GO) Load Serving Entity (LSE) Reliability Coordinator (RC) Reserve Sharing Group (RSG) Resource Planner (RP) Transmission Operator (TOP) Transmission Owner (TO) Transmission Planner (TP)	

\* Mapped To Entity:

Available	Selected

# Entity Function Mapping - GOP Registration

Select the GO function from the "Mapped To Functions" field, and move GO to the "Selected" field.

In the "Mapped To Entity" field, select the appropriate GO, and move the entity name to the "Selected" field. Click Save, and then Close to complete the mapping.

NOTE: A list of registered entities in the Texas RE region will appear in the "Mapped to Entity" field.

NERC Defined:

\*Mapped Functions: Available Selected  
Generator Operator (GOP)

\*Mapped To Functions: Available Selected  
Balancing Authority (BA)  
Load Serving Entity (LSE)  
Reliability Coordinator (RC)  
Reserve Sharing Group (RSG)  
Resource Planner (RP)  
Transmission Operator (TOP)  
Transmission Owner (TO)  
Transmission Planner (TP)  
Generator Owner (GO)

\*Mapped To Entity: Available Selected  
ARC (ARC)  
A list of all registered GOs in the Texas RE region will be displayed in this field.

NERC Defined:

\*Mapped Functions: Available Selected  
Generator Operator (GOP)

\*Mapped To Functions: Available Selected  
Balancing Authority (BA)  
Load Serving Entity (LSE)  
Reliability Coordinator (RC)  
Reserve Sharing Group (RSG)  
Resource Planner (RP)  
Transmission Operator (TOP)  
Transmission Owner (TO)  
Transmission Planner (TP)  
Generator Owner (GO)

\*Mapped To Entity: Available Selected  
ABC (ABC)

Save Audit Trail Close



# Entity Function Mapping - GOP Registration

The screenshot displays the OATI Entity Function Mapping interface. On the left is a navigation menu with options: Entity, Reliability Functions, Contacts, Documents (0), Entity Function Mapping (selected), NERC Validation (0), and Everything. The main content area features a table with the following columns: Action, Mapped Function, Mapped To Function, Mapped To Entity, NERC Defined, Mapped To Entity Active, Mapped Function De-Registration Date, and Mapped To Function De-Registration Date. A single row is visible with the following data: Action: Edit (dropdown), Mapped Function: Generator Operator (GOP), Mapped To Function: Generator Owner (GO), Mapped To Entity: ABC (ABC), NERC Defined: Yes, Mapped To Entity Active: Yes, and two empty de-registration date fields. Below the table, a purple status bar shows the date and time '08/02/2016 09:30:42 CPT', 'Page 1 of 1', and 'Record 1 of 1'. An 'Add Function Mapping' button is located below the table.

Action	Mapped Function	Mapped To Function	Mapped To Entity	NERC Defined	Mapped To Entity Active	Mapped Function De-Registration Date	Mapped To Function De-Registration Date
Edit	Generator Operator (GOP)	Generator Owner (GO)	ABC (ABC)	Yes	Yes		

Once the function is mapped, the above screen will appear. This illustrates the GOP entity has been mapped to the GO function and entity.

An entity can map a function to multiple entities.

An email will be generated and distributed to both entities' PCCs indicating a mapping has been created for a specific function.

# webCDMS Entity Function Mapping Reporting Screen

To view the Entity Function Mapping Reporting, select: Administration, Entity Management, and Entity Function Mapping Reporting.

The screenshot shows the webCDMS interface with the following elements:

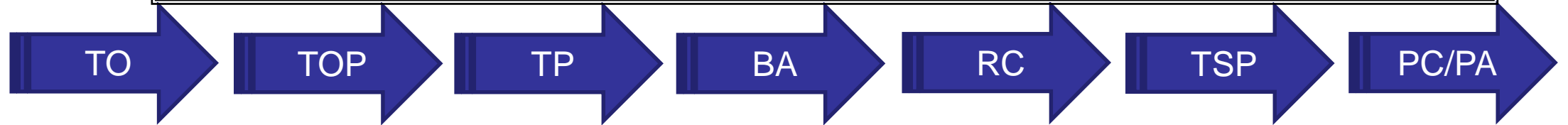
- Header: OATI webCDMS DEMO
- Navigation Menu: Administration, Document Management, Compliance, Enforcement, Logout, Help, Window
- Entity Management Sub-menu: Dashboard, News, User Configuration, Entity Management (selected), User Management, CDMS Administration, Static Data, Management Reports
- Entity Reporting Sub-menu: Entity Reporting, Entity Function Mapping Reporting (selected), Entity
- Table Data:

Compliance Jurisdiction	Type	Region
United States (1)	Registered Entity	TRE

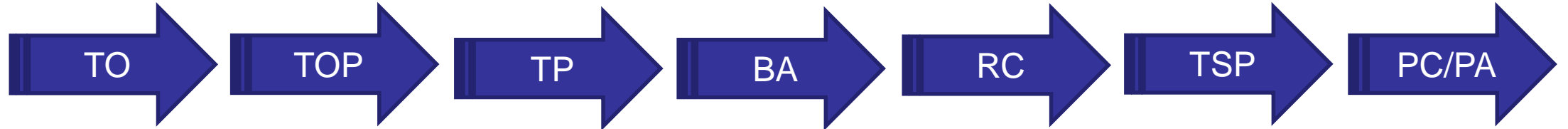
# Entity Logistical Mapping Flow for Functions

- **DP**

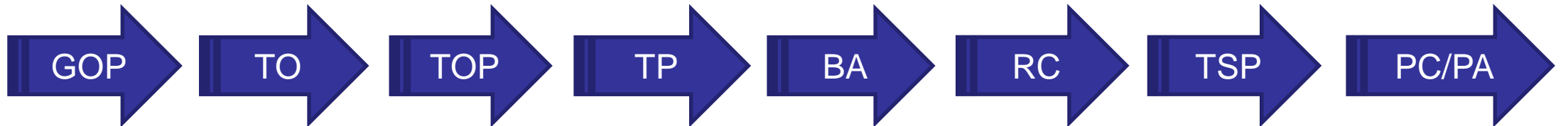
To complete the mapping process, all registered functions will need to be mapped. To complete mapping for the functions of DP, DP-UFLS, GO, and GOP, the following logistical flow has been provided as a guide.



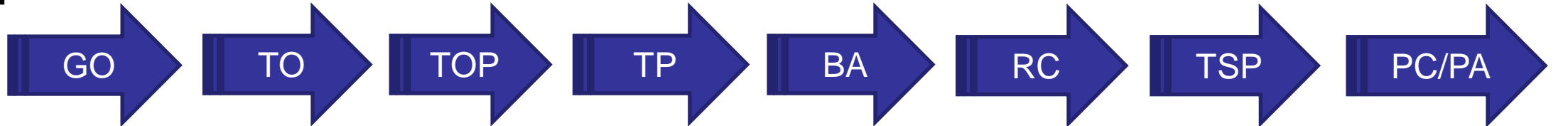
- **DP-UFLS**



- **GO**



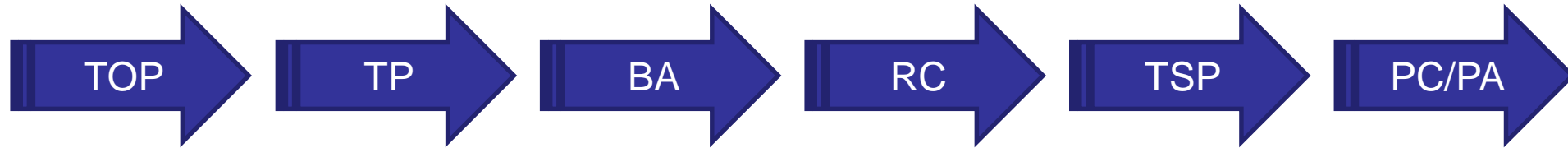
- **GOP**



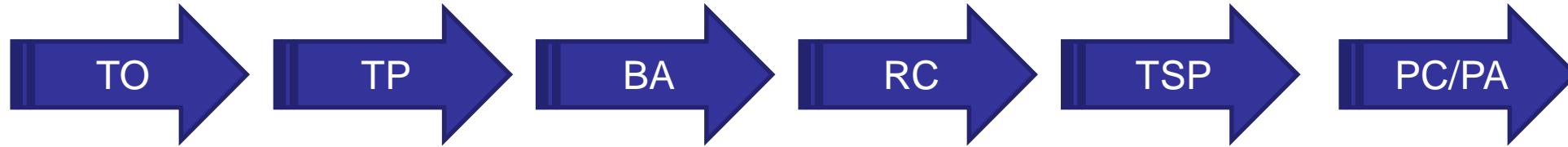
# Entity Logistical Mapping Flow for Functions

- **TO**

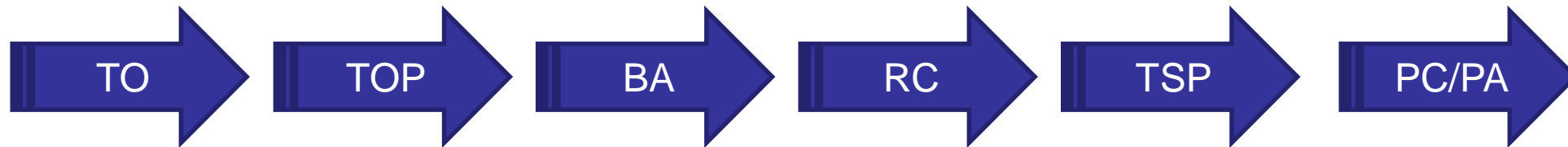
To complete the mapping process, all registered functions will need to be mapped. To complete mapping for the functions of TO, TOP, and TP the following logistical flow has been provided as a guide..



- **TOP**



- **TP**



# Mapping to Multiples Entities

If more than one entity performs a function, multiple entities may be selected.

To map to multiple entities for a single function, use the Ctrl key to select entities. Once selected, use the right arrow to move to the “Selected” field. Click on Save and Close the screen.

**NERC Defined:**

**\*Mapped Functions:**

Available	Selected
	Generator Operator (GOP)

**\*Mapped To Functions:**

Available	Selected
Balancing Authority (BA) Load Serving Entity (LSE) Reliability Coordinator (RC) Reserve Sharing Group (RSG) Resource Planner (RP) Transmission Operator (TOP) Transmission Owner (TO) Transmission Planner (TP)	Generator Owner (GO)

**\*Mapped To Entity:**

Available	Selected
DEF GHI JKL All GOs in the Texas RE region will be displayed in this field.	ABC (ABC)

Save Audit Trail Close

# Edit/Delete Entity Function Mapping

Entity Function Mapping

Action	Mapped Function	Mapped To Function	Mapped To Entity	NERC Defined	Mapped To Entity Active	Mapped Function De-Registration Date	Mapped To Function De-Registration Date
<a href="#">Edit</a>	Generator Operator (GOP)	Generator Owner (GO)	ABC (ABC)	Yes	Yes		
<a href="#">Edit</a>	Generator Operator (GOP)	Transmission Owner (TO)	DEF (DEF)	Yes	Yes		
<a href="#">Edit</a>	Generator Operator (GOP)	Transmission Operator (TOP)	DEF (DEF)	Yes	Yes		

08/02/2016 10:19:17 CPT Page 1 of 1 Records 1-3 of 3  
Add Function Mapping

To Edit or Delete, use the down arrow. Select Edit Mapping or Delete Mapping to update the Entity Function Mapping.

Entity Function Mapping

Action	Mapped Function	Mapped To Function	Mapped To Entity	NERC Defined	Mapped To Entity Active	Mapped Function De-Registration Date	Mapped To Function De-Registration Date
<b>Actions</b> <a href="#">Edit Mapping</a> <a href="#">Delete Mapping</a>							
<a href="#">Edit</a>	Generator Operator (GOP)	Generator Owner (GO)	ABC (ABC)	Yes	Yes		
	Generator Operator (GOP)	Transmission Owner (TO)	DEF (DEF)	Yes	Yes		
<a href="#">Edit</a>	Generator Operator (GOP)	Transmission Operator (TOP)	DEF (DEF)	Yes	Yes		

08/19/2016 11:16:29 CPT Page 1 of 1 Records 1-3 of 3  
Add Function Mapping

# Entity Function Mapping Email Notification

Entity Function Mapping will generate an email to the PCC of the entity creating the change, and to the PCC of the mapped-to entity.  
Entities will receive notifications for mapping that have been created, updated, or deleted.

**Note:** This is a webCDMS application generated message. Please Do NOT respond to this email. If you have questions, please contact [webcdms@texasre.org](mailto:webcdms@texasre.org).

Entity Name: **T** Your Entity Name (YEN)

Mapped Function: **GOP**

Mapped To Function: **TO, TOP**

Mapped To Entity: **DEF**

Thank you, OATI

**CONFIDENTIAL INFORMATION:** This email and any attachment(s) contain confidential and/or proprietary information of Open Access Technology International, Inc. Do not copy or distribute without the prior written consent of OATI. If you are not a named recipient to the message, please notify the sender immediately and do not retain the message in any form, printed or electronic.

[OATI Information - Email Template: Entity\_MappedFunction\_Updated]

## Support Contact

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**If you have any questions about performing the Entity Function Mapping in webCDMS, please contact [registration@texasre.org](mailto:registration@texasre.org) or Rochelle Brown at (512) 583-4921.**