

## Instructions for Acquiring a New User Account in the OATI NERC webPortal

### Acquiring a digital certificate from OATI.

The following step by step instructions are for acquiring a new user account for an existing company to access the OATI NERC webPortal\*. The Information Security Officer at the NERC registered entity is responsible for identifying, verifying, creating, distributing, revoking, renewing, and archiving digital certificates across the respective organization. NERC can only see the digital certificate under the Company if it is set to Public by the Information Security Officer and attached to the company by the OATI Support team.

*\*Requires Microsoft Edge or Google Chrome.*

#### Step 1: Check whether you have an OATI digital certificate for use with another OATI product.

- A. To access your certificate cache in Edge, in the **three ellipses (1)** menu, select **Settings (2)** (Figure 1).

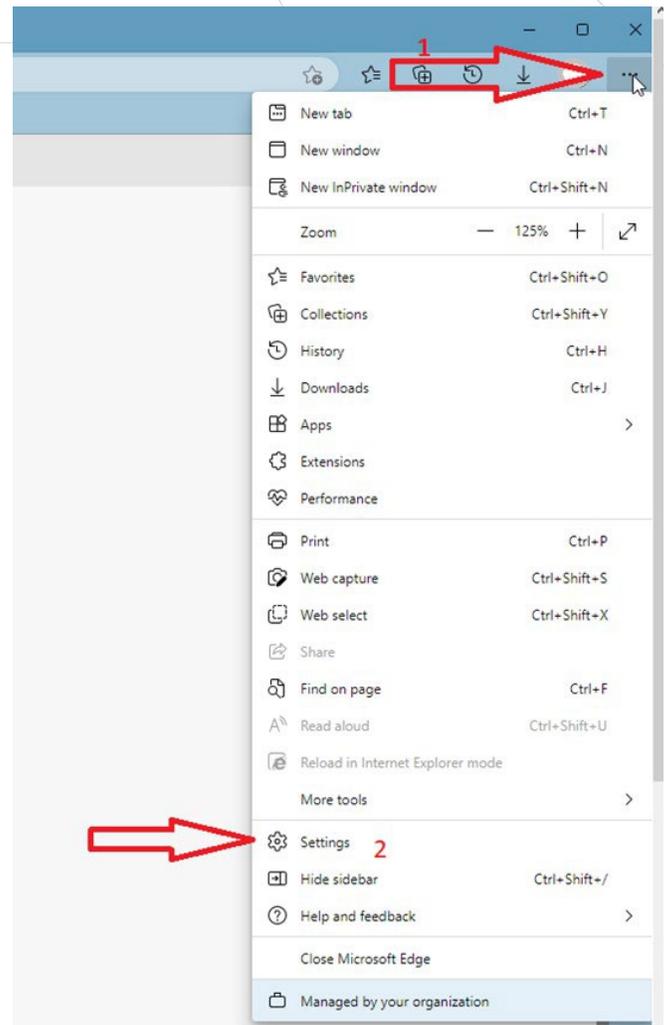


Figure 1

B. Click the **Privacy, search and services** listing (3) and then the **Manage Certificates** (4) button to display your certificate store (Figure 2).

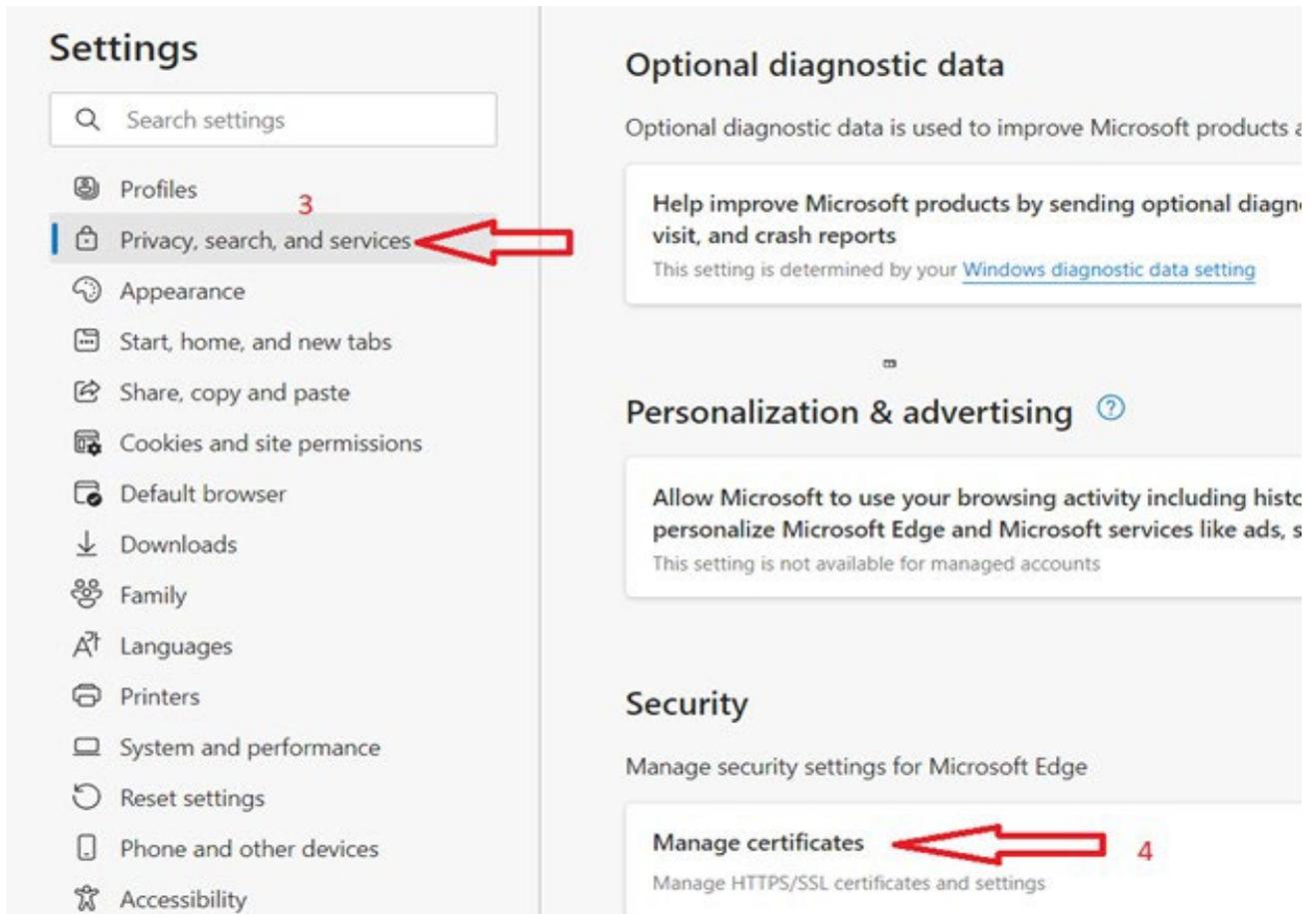


Figure 2

- C. In the column **Issued To**, look for the following certificate titled “**webCARES Issuing...**” (Figure 3)
- D. If you have the webCARES certificate, verify it has not expired by checking the **Expiration Date** (Figure 3). If the certificate is expired, contact your company’s Security Officer to update or renew the digital certificate. Once that has been completed return here to complete registration setup.

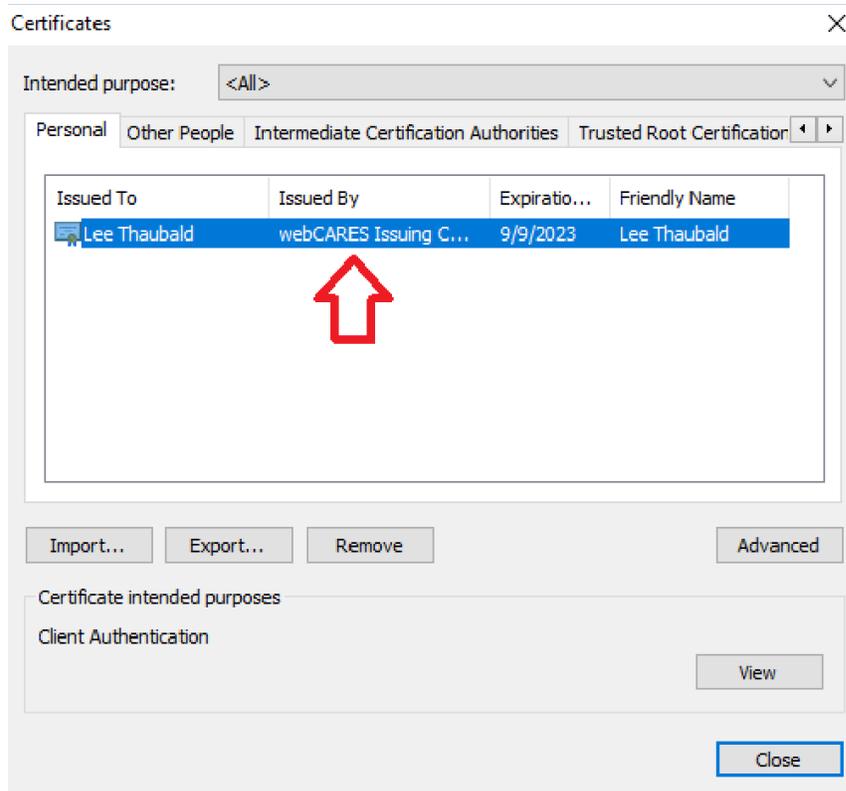


Figure 3

- E. If you already have an OATI digital certificate, go to **Step 2.A**
- F. If you do not have an OATI digital certificate, go to **Step 2.B**

## Step 2: Acquiring a user account for the OATI NERC webPortal

- A. Complete page 4 of this document (NERC OATI WebPortal Application User Registration Form)
- B. If the Company/User has an existing webCAREs account with OATI:
  1. Mark “**Yes**” for question **1. Does your company have a webCARES account with OATI?**
  2. Contact your company’s Information Security Officer to obtain digital certificate for the webPortal user (must be set to Public)
  3. Once the digital certificate is issued, send the completed NERC OATI WebPortal Application User Registration Form (Page 4) to the appropriate NERC support application email address indicated on the form
- C. If Company/User does not have an existing webCAREs account with OATI:
  1. Mark “**No**” for question **1. Does your company have a webCARES account with OATI?**
  2. Contact OATI Support (763-201-2000 or [support@oati.net](mailto:support@oati.net)) to establish a webCARES account
  3. After the webCARES account has been established and digital certificates are available, send the completed “NERC OATI WebPortal Application User Registration Form” (See Page 4) to the appropriate NERC support application email address indicated on the form

## Step 3: NERC OATI WebPortal Application User Registration Form

### DIGITAL CERTIFICATE INFORMATION

Please answer the questions below, mark yes/no as appropriate. You may need to contact your company's Information Security Officer for information.

1. Does your company have a webCARES account with OATI? YES  NO 
  - If NO, contact OATI (763-201-2000 or email [OATI webCARES](#)) to request to set up a webCARES account
  - If YES, does the User have an OATI digital certificate? YES  NO 
    - If NO, contact your company's Information Security Officer to obtain a digital certificate for the NERC OATI webPortal user.

### NEW OWNER COMPANY INFORMATION

NERC Compliance Registry ID (NCR):	
Click here to search for ID number: <a href="#">Organization Registration and Organization Certification</a> Scroll down to: Compliance Registry Files > NERC Active Entities List	
Company Name:	

### USER REGISTRATION INFORMATION

User is the individual who will administer users, unit and contact information in the NERC OATI webPortal

Desired User Name: <i>case sensitive, suggestion lastnamefirstname</i>	
First name:	
Last Name:	
Email:	
Phone:	

### NERC Data Collection Applications

Put a check in the box next to the application(s) for which you are applying to access.

1. **webE-GADS** - an interactive web interface for GOs and GOPs to submit their GADS data to NERC for conventional generating units
  - Send this form via email to [gads@nerc.net](mailto:gads@nerc.net)
2. **webTADS** - an interactive web interface for TOs to submit their TADS data to NERC
  - Send this form via email to [tads@nerc.net](mailto:tads@nerc.net)
3. **GADS Wind** - an interactive web interface for GOs and GOPs to submit their wind plant data to NERC
  - Send this form via email to [gadswind@nerc.net](mailto:gadswind@nerc.net)
4. **GADS Solar** - an interactive web interface for GOs and GOPs to submit their solar plant data to NERC
  - Send this form via email to [gadssolar@nerc.net](mailto:gadssolar@nerc.net)