Instructions for Acquiring a New Account for an Existing Company in the OATI NERC webPortal

Acquiring a digital certificate from OATI.

The following step by step instructions are for acquiring a new account for an existing company in the OATI NERC webPortal*. The Information Security Officer at a registered entity is responsible for identifying verification, 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 IE8 or later (Chrome and other Internet browsers are not compatible).

Step 1: Verify that you do not already have an OATI digital certificate for use with another OATI product.

    A.   To access your certificate cache in IE, in the **Tools** menu, select **Internet Options** (Figure 1).
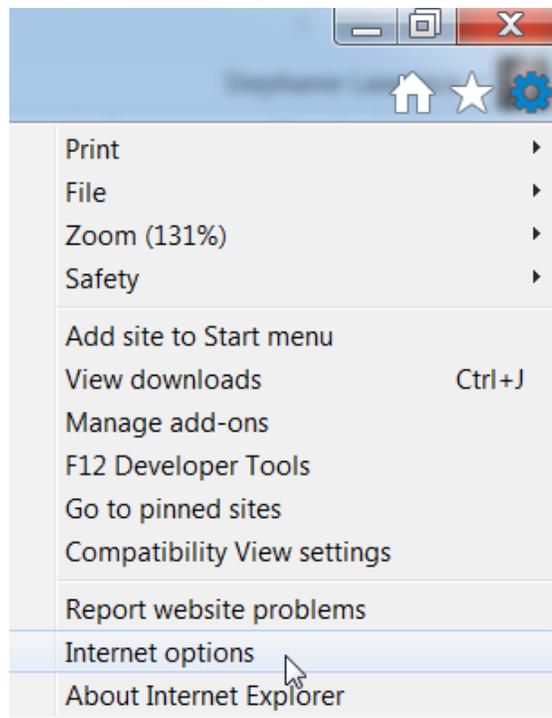

Figure 1

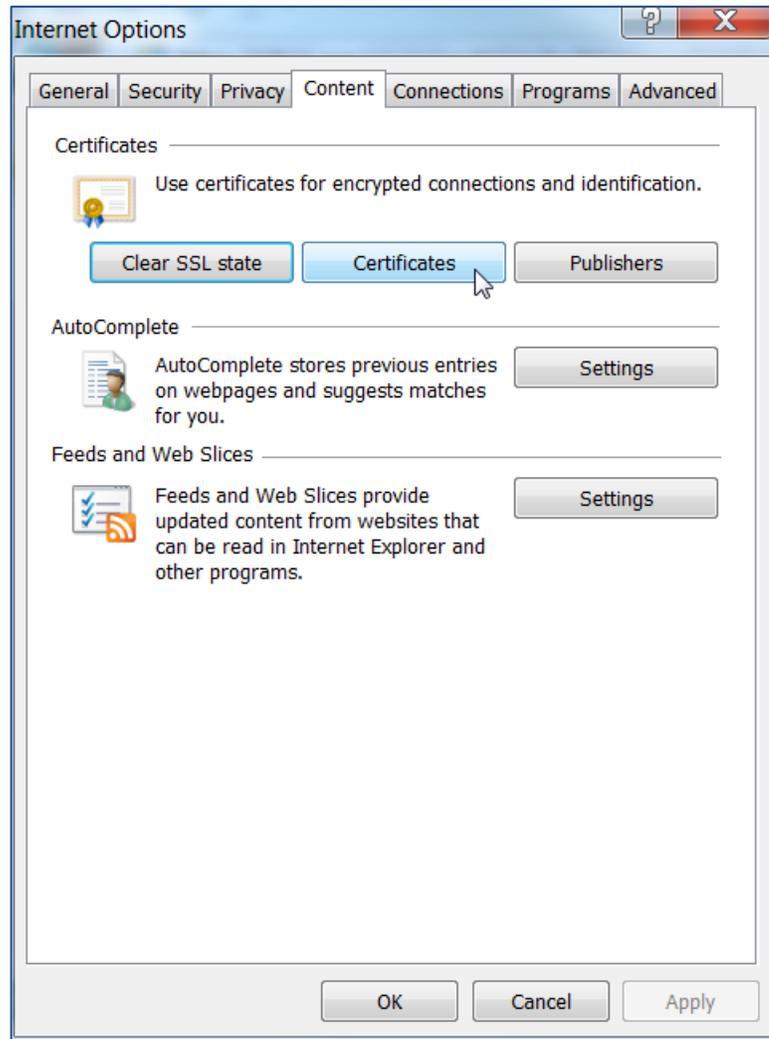B. Click the **Content** tab and then the **Certificates** button to display your certificate store (Figure 2).

Figure 2

C. In the column **Issued By**, 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.
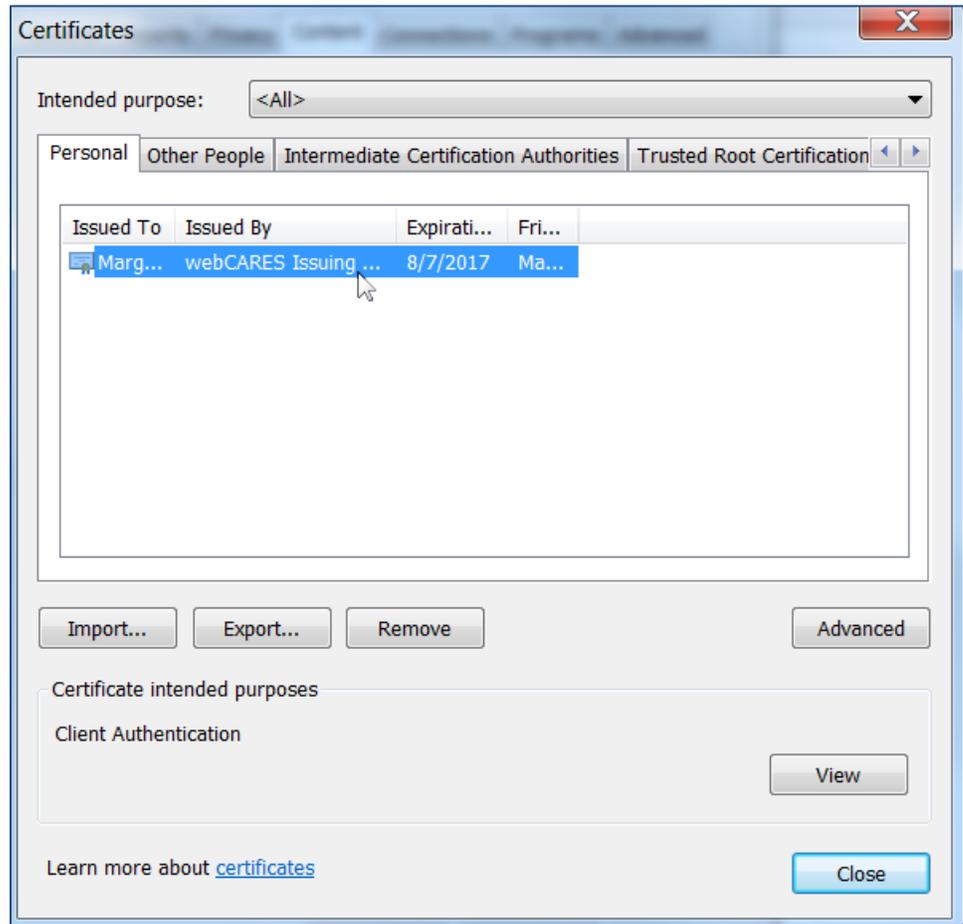
Figure 3

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 an account in the OATI NERC webPortal.

A. Company/User has an existing webCAREs account:
    1. Mark "**Yes**" for question **1. Does your company have a webCARES account with OATI?**
    2. Send the completed "WebPortal Registered Entity User Admin Registration Form"
        (See Page 4) to the appropriate support application email address indicated at the top of the
        form.

B. Company/User does not have an existing webCAREs account:
    1. Mark "**No**" for question **1. Does your company have a webCARES account with OATI?**
    2. Send the completed "WebPortal Registered Entity User Admin Registration Form"
        (See Page 4) to the appropriate support application email address indicated at the top of the
        form.
    3. NERC will contact OATI to initiate the establishing of a webCARES account with OATI

Step 3: Establishing a webCARES account with OATI.

WebPortal Registered Entity User Admin 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, email this form to OATI webCARES to set up a contract to obtain Digital Certificate
   - **If YES, does the User Admin have an OATI digital certificate? YES ☐ NO ☐**
     - If NO, contact your company's Information Security Officer to issue a digital certificate for the webPortal user admin.

NEW OWNER COMPANY INFORMATION

NERC Compliance Registry ID (NCR):	
Click here to search for ID number: Organization Registration and Organization Certification *Scroll down to: Compliance Registry Files > NERC Active Entities List*	
Company Name:	
Region Name:	
Country Name:	

USER ADMIN REGISTRATION INFORMATION

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

Desired User Name: *case sensitive, suggestion lastnamefirstname*	
First name:	
Last Name:	
Middle Initial:	
Email:	
Phone:	

NERC PRODUCTS

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

1. webE-GADS - an interactive web interface for GOs and GOPs to submit their GADS data to NERC
2. webTADS - an interactive web interface for TOs to submit their TADS data to NERC
3. webDADS - an interactive web interface for BAs to submit their DADS data to NERC

Email the completed form to: GADS for access to webE-GADS; TADS for access to webTADS; and DADS for access to webDADS. Also include support@oati.net and the Regional contact.
Click here to find your Regional Contact: GADS; TADS; DADS.

Please be aware that OATI Help Desk personnel may call you at the contact phone number that you provided to NERC to validate and verify the data above in order to continue with the webPortal User Admin registration process.