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**SMART METER**  
**— TEXAS —**

**Retail Electric Provider**  
**REP of Record (ROR)**  
**User Guide**

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## 1 Welcome to Smart Meter Texas

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Welcome to Smart Meter Texas! From the Smart Meter Texas (SMT) web portal, you will be able to monitor your Customers' electricity usage by viewing data from your Customers' Smart Meter. To gain access to SMT for your Retail Electric Provider (REP) company, you must:

- Have a valid DUNS number registered with the Public Utility Commission of Texas (PUCT)
- Be approved by one of the Transmission and Distribution Service Providers (TDSP) doing business in the Texas competitive retail market

If your company already has SMT access, then you can request access to your Company's SMT account as a new User or a secondary Administrator. One of your company's existing SMT administrators must approve your access.

A special entry point into the SMT website, [private.SmartMeterTexas.com](http://private.SmartMeterTexas.com), has been setup for:

- Retail Electric Providers (REP),
- Third-Party Service Providers (Third-Party),
- the Electric Reliability Council of Texas (ERCOT),
- the Public Utility Commission of Texas (PUCT) and
- Transmission and Distribution Service Providers (TDSP).

This private site has pre-registration information that is specific to these parties. Your Customers are instructed to access the SMT website at [www.SmartMeterTexas.com](http://www.SmartMeterTexas.com). This site contains pre-registration information specific to Customers.

You must go to the special entry point in order to register for a new account. If you have a SMT Account already, you may login from either entry point.

For additional help, contact the SMT Help Desk: (888) 616 – 5859.

## 1.1 About this User Guide

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This User Guide provides you with detailed step-by-step instructions on how to access your Customers' Smart Meter information and their electricity usage data as their REP of Record.

Information and step-by-step Instructions on how to access your Customers' usage data and In-Home Devices as a Third-Party Service Provider can be found in the Smart Meter Texas (SMT) Third-Party Service Provider User Guide.

### 1.1.1 SMT Navigation

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SMT screens use a standard layout consisting of navigation tabs across the top and a left navigation menu. Throughout this User Guide, you will see references about navigating to a tab or selecting from the left menu. The location of the tabs and left navigation menu are shown in Figure 1.

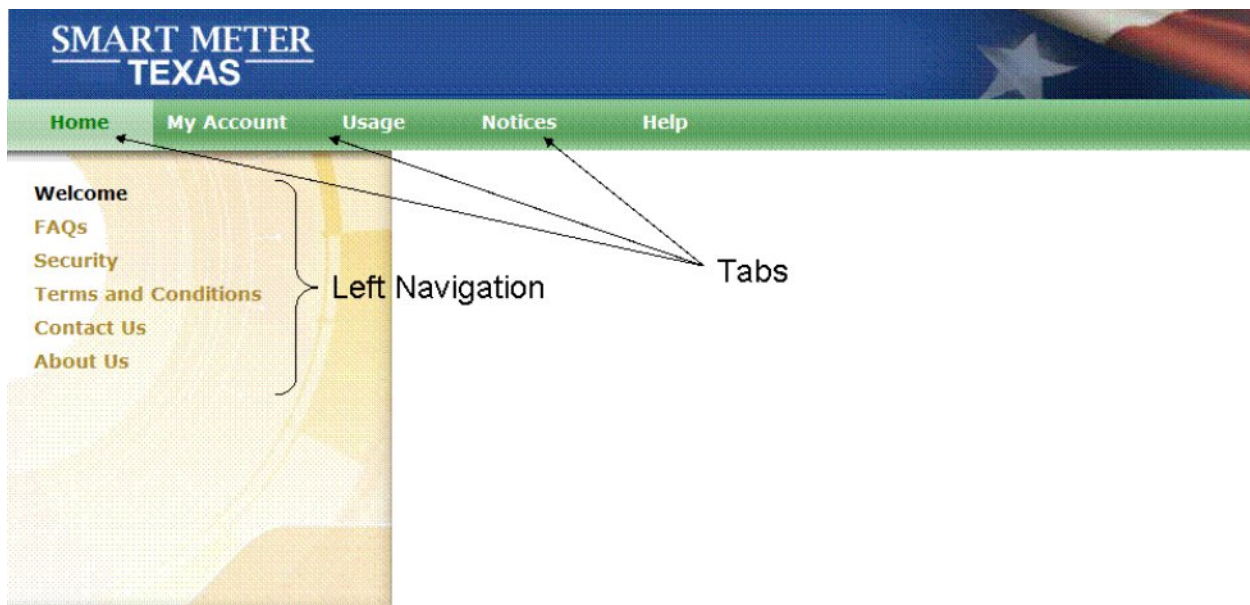


Figure 1: SMT Screen Layout

SMT has a large amount of content organized in hierarchical manner; therefore "breadcrumbs" (or "breadcrumb trail") are utilized as a navigation tool that reveals the user's location within a specific Left Navigation link and can be used to go back to any of the previous screens that were used to arrive to the current location. "Breadcrumbs" are horizontally arranged text links separated by the "slash" symbol (/).

In SMT, breadcrumbs offers a way to trace the path back to previous steps and the original landing point within a Left Navigation link. In SMT, you must use the "breadcrumbs" instead of the browser's "back" button. Example of a breadcrumb is shown in Figure 2.



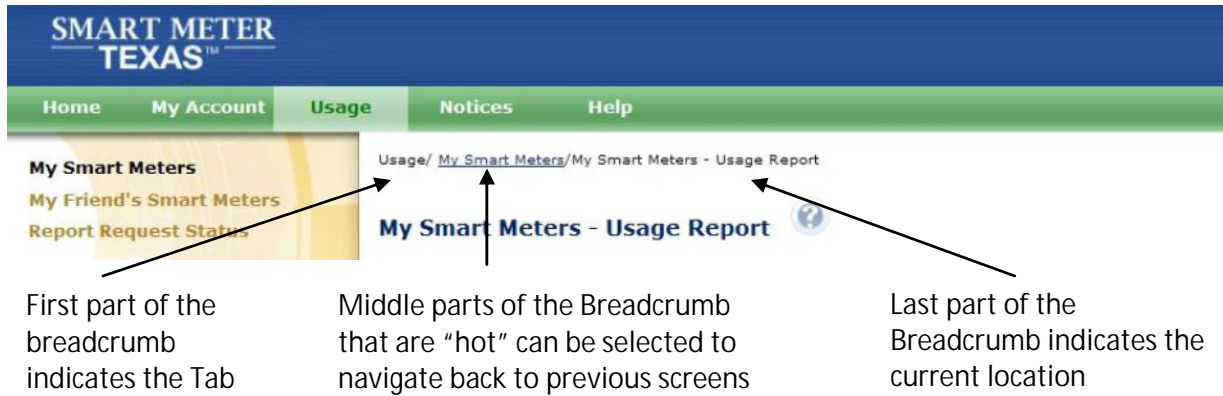


Figure 2: Breadcrumbs

### 1.1.2 Icons

SMT screens use icons to denote specific kinds of information.










SMT Icon Descriptions	
	Task has completed successfully.
	An error or problem has occurred and the task cannot be completed as requested.
	Warning – this situation could cause a problem in the future.
	Information about a situation is being presented.
	Help entry point. Clicking this icon will display page help for the current page.
	Calendar selection. Clicking this icon will display a calendar that can be used to select a specific date.
	Data is shown sorted in ascending order by this column.
	Data is shown sorted in descending order by this column.
	Special notes contained in this document.

Figure 3: SMT Icon Descriptions

### 1.1.3 System Requirements

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SMT System Requirements	
Browser	Internet Explorer (IE) 6.0 or higher Firefox 3.0 or higher
Browser Options	Cookies enabled Javascript enabled
Display Resolution	1024 x 768, for optimal screen display

Figure 4: SMT System Requirements

## 2 Getting Started – Registering for Smart Meter Texas (SMT)

REP companies must have at least one (1) and no more than four (4) administrators. Administrators manage users and control access to your Company's data. If you are the first user registering at SMT for your Company, you will have the Administrator access. All new REP Company accounts require approval by an Administrator from one of the existing TDSPs. SMT handles the request for approval automatically. You will be notified via email when your Company is approved or declined.

Once the REP Company is approved, other Administrators and Users may register for access to your existing REP Company and must be approved by an existing Administrator of your REP Company. For more information on the capabilities of Administrators and Users, see Section 5.1 Users vs. Administrators.





NOTE: New registrants need to be able to locate your REP Company by company name.







NOTE: Your customers need to be able to identify your Company as their REP by your company name when they register at Smart Meter Texas (SMT). If you registered your DUNS number in ERCOT with a different company name, both company names will be displayed to your customers when they search for their REP of Record in SMT.

### 2.1 Creating a New REP Company Account

SMT Procedure – Creating a New REP Company Account	
Step	Action
1	From your browser, go to the SMT website's private entry point for REPs, Third-Parties and TDSPs:  <a href="http://private.SmartMeterTexas.com">private.SmartMeterTexas.com</a>
2	Click 'New User Register' button or 'Register Now' link
3	Click 'Create a New REP Account' link
4	Company Name (required)  Enter your Company name. It is recommended to use the Company name you used on your Customers' bills.
5	Address 1 (required)  Enter the primary address for your Company.
6	Address 2  Enter a second line of address for your Company.

SMT Procedure – Creating a New REP Company Account	
Step	Action
7	<p>City (required)</p> <p>Enter the city for your Company address.</p>
8	<p>State (required)</p> <p>Select the state for your Company address from the dropdown box. The default state is TX (Texas).</p>
9	<p>Zip Code (required)</p> <p>Enter the zip code for your Company address.</p>
10	<p>Country (required)</p> <p>Select the country for your Company address from the dropdown box. The default country is United States.</p>
11	<p>Phone (required)</p> <p>Enter the preferred contact phone number for your Company.</p>
12	<p>Account Email Address (required)</p> <p>Enter the preferred Company email address.</p> <p> NOTE: SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).</p>
13	<p>Re-enter Email Address (required)</p> <p>This entry must exactly match the previous entry for Email Address.</p>
14	<p>DUNS Number (at least one required)</p> <p>You must enter at least one valid DUNS Number in order to complete the Registration process. The DUNS Number is the 9- or 13-digit number issued by Dun &amp; Bradstreet that your REP uses to do business in the Texas competitive retail electric market.</p> <p> NOTE: Administrators may add or remove any DUNS Numbers after you have successfully registered by changing your Company Profile. Each added DUNS Number will automatically be sent to the TDSPs for approval. Removing a DUNS does not require approval.</p>

SMT Procedure – Creating a New REP Company Account	
Step	Action
15	<p>Company URL (optional)</p> <p>You may provide the URL of your company's website.</p>  <p>NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to your Company's website.</p>
16	<p>Privacy Policy URL (optional)</p> <p>You may provide the URL for your company's Privacy and Security Policy webpage.</p>  <p>NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to the Privacy Policy page of your Company's website.</p>
17	<p>Upload Company Logo (optional)</p> <p>You may provide an image of your company's logo. The image file you want to upload must be less than 20KB.</p>  <p>NOTE: Your company logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.</p>
18	<p>Privacy Seal Requirements (optional)</p> <p>Check this box if your company has met the requirements of the Trusted Smart Grid Privacy Program by TRUSTe and is certified to use the Trusted Smart Grid Privacy Seal. For more information about the TRUSTe certification program, go to <a href="http://www.truste.com">www.truste.com</a>.</p>  <p>NOTE: If you check this box, the Smart Grid Privacy Seal logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.</p>
19	Click 'Next' button
20	<p>First Name (required)</p> <p>You will be the first Administrator for your Company. Enter your first name.</p>
21	<p>Middle Initial</p> <p>Enter your middle initial.</p>
22	<p>Last Name (required)</p> <p>Enter your last name.</p>
23	<p>Suffix</p> <p>Enter any name suffix (Jr, Sr, III).</p>

SMT Procedure – Creating a New REP Company Account	
Step	Action
24	Phone Enter your preferred contact phone number.
25	Email Address (required) Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. As an Administrator, you will also receive copies of the email notifications that are sent to the Company Email Address, such as notification of SMT registration requests that are pending approval by an Administrator.
26	Re-enter Email Address (required) This entry must exactly match the previous entry for Email Address.
27	User ID (required) Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.
28	Terms and Conditions (required) You must agree to the stated Terms and Conditions in order to access SMT.
29	Click 'Finish' button If all required fields have been entered successfully, a confirmation will be displayed. You will receive an email notice that will contain the temporary password for your Account.

Figure 5: SMT Procedure – Creating a New REP Company Account

## 2.2 Requesting Access to an Existing REP Company Account

SMT Procedure – Requesting Access to an Existing REP Company Account	
Step	Action
1	From your browser, go to the SMT website's private entry point for REPs, Third-Parties and TDSPs: <a href="http://private.SmartMeterTexas.com">private.SmartMeterTexas.com</a>
2	Click 'New User Register' button or 'Register Now' link
3	Click 'Request Access to an Existing REP Account' link

SMT Procedure – Requesting Access to an Existing REP Company Account	
Step	Action
4	<p>Type the Business Name</p> <p>Enter your REP Company Name.</p> <p>You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all REP Company Names that begin with 'abc'</p> <p>a*bc shows all REP Company Names that begin with 'a' and end with 'bc'</p> <p>*abc shows all REP Company Names that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search.</p>
5	<p>Click 'Search' button</p> <p>OR</p> <p>Select a Letter to find the Business in the List</p> <p>Select a letter to display all REP Company names that begin with that letter.</p>
6	<p>Select checkbox (required)</p> <p>Select the REP Company that you wish to access.</p>
7	<p>Click 'Register as an Admin' button or 'Register as a User' button</p>
8	<p>First Name (required)</p> <p>Enter your first name.</p>
9	<p>Middle Initial</p> <p>Enter your middle initial.</p>
10	<p>Last Name (required)</p> <p>Enter your last name.</p>
11	<p>Suffix</p> <p>Enter any name suffix (Jr, Sr, III).</p>
12	<p>Phone</p> <p>Enter your preferred contact phone number.</p>
13	<p>Email Address (required)</p> <p>Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. If you will be an Administrator, you will also receive copies of the email notifications that are sent to the Company Email Address, such as notification of SMT registration requests that are pending approval by an Administrator.</p>

SMT Procedure – Requesting Access to an Existing REP Company Account	
Step	Action
14	<p>Re-enter Email Address (required)</p> <p>This entry must exactly match the previous entry for Email Address.</p>
15	<p>User ID (required)</p> <p>Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.</p>
16	<p>Terms and Conditions (required)</p> <p>You must agree to the stated Terms and Conditions in order to access SMT.</p>
17	<p>Click 'Finish' button</p> <p>You will receive a confirmation screen. An email will be sent to the Administrators of the existing Company notifying them of your request. Your Account must be approved by one of the Administrators for your REP Company before you can access SMT. When you are approved or declined by a REP Company Administrator, you will receive notification via email. If approved, that email notice will contain the temporary password for your Account.</p>

Figure 6: SMT Procedure – Requesting Access to an Existing REP Company Account



### 3 Managing Smart Meters

#### 3.1 Displaying Your Customer Meter List – My Account

Your Customer Meter List contains all of the Smart Meters that are associated with your Account. For a Smart Meter to be associated with your Account, your Company must be the REP of Record (ROR) as reported by the TDSPs. If the Smart Meter has been attached to an SMT Customer Account, then you will see the Customer Name and Email address from the Customer's SMT Profile. If the Customer Name and Email are blank, then the Customer has not registered for an SMT account. Figure 7 shows an example of a Customer Meter List when displayed in SMT.

<input type="checkbox"/>	Customer▼	Email▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Demo_Customer SMT	drihn@us.ibm.com	123 Demo Drive	Anytown	TX	88888880000000001	888888001
<input type="checkbox"/>	Demo_Customer SMT	drihn@us.ibm.com	123 Demo Drive	Anytown	TX	88888880000000002	888888002
<input type="checkbox"/>			123 Demo Drive	Anytown	TX	88888880000000003	888888003

Figure 7: Customer Meter List – My Account



**NOTE:** To learn how to display the list of the Smart Meters associated with Customer Agreements, refer to the SMT Third-Party Service Provider User Guide.

If you have 25 or fewer Smart Meters associated with your Account, your Meter List will automatically display. If you have more than 25 Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Customer Meter List (25 or fewer Smart Meters) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Meters (ROR)' from the left menu

Figure 8: SMT Procedure – Displaying Customer Meter List (25 or fewer Smart Meters) – My Account

##### 3.1.1 Searching for Meters – My Account

If you have more than 25 Smart Meters associated with your Account, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Customer Meter List. You may also click the link 'Show All' to display all the Smart Meters associated with your Account.



NOTE: If you have more than 500 Smart Meters associated with your Account, the 'Show All' link will not appear. In this case, you must search for a specific meter or group of meters. A search can be performed on up to 100 meters or ESI IDs if you enter the ESI ID values on the search screen. To know how to conduct a search on more than 100 meters read the Section 3.1.2 Search for Meters by Importing a File – My Account.

SMT Procedure – Displaying Customer Meter List (Show All) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Click 'Show All' link

Figure 9: SMT Procedure – Displaying Customer Meter List (Show All) – My Account

SMT Procedure – Displaying Customer Meter List (Search for Meters) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Select type of meter identifier (required) Select to search by either ESI ID or Meter Number
4	Type one or more meter numbers (required) Enter up to 100 ESI IDs or Meter Number (but not both) to correspond with your search type. Values should be separated by a comma (.). You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123). 123* shows all ESI IDs/Meter Numbers that begin with '123' 1*23 shows all ESI IDs/Meter Numbers that begin with '1' and end with '23' *123 shows all ESI IDs/Meter Numbers that end with '123' You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.
5	Click 'Search' button The Search will look for the specified meters among the Smart Meters that are associated with your Account.

Figure 10: SMT Procedure – Displaying Customer Meter List (Search for Meters) – My Account

### 3.1.2 Search for Meters by Importing a File – My Account

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meters. You can then import that file and search for your specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one value that identifies the Smart Meter – either the ESI ID or the Meter Number. ESI IDs and Meter Numbers cannot be mixed in the same file. Following is an example of the format for an ESI ID file:

```
99999990000000116
99999990001234567
99999990000000789
```

Here is an example of the format for a Meter Number file:

```
900000116
900000123
200001987
```

For help creating a CSV file, see Appendix A: Working with CSV Files.



NOTE: SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Select type of meter identifier (required) Select to search by either ESI ID or Meter Number. All entries in the corresponding import file will be interpreted as this type of value.
4	Import Meter(s) from a file (required) The file type must be CSV. Click 'Browse' to select the file from your computer. For help creating a CSV file, see Appendix A: Working with CSV Files.

SMT Procedure – Search by Importing a File – My Account	
Step	Action
5	<p>Click 'Import' button</p> <p>Import the file and search for the designated meters in your Meter List. The results of your search will be consolidated in a file and the following message will appear in your Search Results:</p> <p><input type="checkbox"/> The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Information to use the search results to request Meter and/or Premise Information Reports.</p> <p>Selecting the checkbox will cause the Export Report function to create reports and export data for all of the Smart Meters that were successfully found. For information on exporting reports, see Section 7.3 Exporting Reports.</p>

Figure 11: SMT Procedure – Search by Importing a File – My Account

### 3.2 Adding and Removing Smart Meters

Your Customers' Smart Meters are added or removed from your Account automatically. When you process Texas SET transactions that have an effect on which REP is associated with a customer account (such as Move In/Move Out, Switch request, etc.), the TDSP will automatically notify SMT.

TDSPs notify SMT of the current REP of Record (ROR) and SMT processes the transactions immediately upon receipt. If SMT is notified of a Switch, then the previous REP will lose access to the data from that Smart Meter but the Customer's access is not affected.

If SMT is notified of a Move Out, then both the previous REP and the previous Customer will lose access to the data from that Smart Meter.

If SMT is notified of a Move In, then the incoming REP will immediately gain access to the data from that Smart Meter. However, the incoming Customer will need to manually add the Smart Meter to their own SMT account. See the SMT Customer User Guide for information on adding and removing Smart Meters to customer accounts.



**NOTE:** You can only see Smart Meters for which your Company is the current ROR. You will have access to available historical data if you are the current ROR. If a transaction is processed that changes the ROR status to another REP, you will no longer be able to see any data from the Smart Meter – including data for the time period in which you were the ROR.

### 3.3 Effect of a Meter Change

At some point, the Smart Meter on your Customer's property may need to be replaced by the TDSP. When that happens, the ESI ID for the Smart Meter will remain the same but the Meter Number will change. SMT is automatically notified when this happens.

If the old Smart Meter is replaced with a new Smart Meter then SMT will automatically change the Meter Number associated with the Smart Meter to reflect the current Meter Number. You will continue to have access to the usage data captured by the Smart Meter and your SMT service will be uninterrupted.

If the old Smart Meter is replaced with a conventional meter, your access to the usage data that was collected by the old Smart Meter will no longer be available via SMT.

## 4 Status Values

### 4.1 Account Status

The status of your SMT Account changes when various actions are taken. Figure 12 describes the various Account Status values.



Account Status Values	
Pending	<p>You have successfully completed registration and your Account is pending approval by one of your Company Administrators. If you are the first Administrator and establishing a new REP Company in SMT, then your Account is pending approval by one of the TDSP Administrators.</p> <p> NOTE: If your Company or TDSP Administrator declines your request or does not approve your request within 14 days, you will be notified by email and your registration request will be deleted. If this occurs, you must re-register.</p>
Approved	<p>You have successfully completed registration and all necessary approvals have been granted. A temporary password for your new Account has been sent to your email address but you have not yet logged in for the first time.</p> <p> NOTE: If you do not login within 14 days after receiving approval, you will be notified by email and your Account will be deleted. If this occurs, you must re-register.</p>
Active	<p>You have successfully logged in for the first time, changed your temporary password, and selected a security question for your Account.</p>
Locked	<p>You have exceeded the number of allowed login attempts with an incorrect password. To reset your Account, a new temporary password must be issued. When your new temporary password is issued, your Account Status will return to Active. See Section 6.3 Forgot Password / Unlocking Your Account.</p>
Suspended	<p>Your Account has been suspended by one of your Company Administrators or by the SMT Team. Your Smart Meters will remain associated with your Account. Your Account can only be re-instated by the SMT Team or by your Company Administrators. Once re-instated, your Account Status will return to Active.</p>
Revoked	<p>Your Account has been revoked by one of your Company Administrators or by the SMT Team. This action cannot be undone. To gain access to SMT, you must register for a new Account.</p>

Figure 12: Account Status Values

## 4.2 Company Status

Your REP Company also carries a status. Your Account Status, your Company Status, and the status for at least one of your DUNS numbers must all be Active for you to gain access to SMT. You can not view your Company status. If you can login, then your Company status is Active. Figure 13 describes the various Company Status values.




Company Status Values	
Pending	<p>Your Company's first Administrator has successfully registered. The REP Company is currently pending approval by a TDSP Administrator.</p> <p> NOTE: If the TDSP Administrator declines the request or does not approve the request within 14 days, the first Administrator will be notified by email and the registration request will be deleted. If this occurs, the first Administrator must re-register the new REP Company.</p>
Approved	<p>Your REP Company and its first Administrator have been approved by a TDSP Administrator. A temporary password for the first Administrator Account has been sent to the email address provided but the Administrator has not yet logged in for the first time.</p> <p> NOTE: If the first Administrator does not login within 14 days after receiving approval, email notification will be sent and the REP Company and associated first Administrator Account will be deleted. If this occurs, the first Administrator must re-register the new REP Company.</p>
Active	<p>The REP Company's first Administrator has successfully logged in for the first time.</p> <p> NOTE: The Company Status must be Active in order for others to register for user access to your Company's Account.</p>
Suspended	<p>Your Company has been suspended by the SMT Team. When this occurred, an email notification was sent to the email address listed in your Company Profile. Your Company can only be re-instated by the SMT Team. Once re-instated, your Company Status will return to Active.</p>
Revoked	<p>Your Company has been revoked by the SMT Team. Any REP Accounts for Users or Administrators for your Company have also been revoked. This action cannot be undone. To gain access to SMT, you must set up a new REP Company and register for a new Account.</p>

Figure 13: Company Status Values

### 4.3 DUNS Status

Each of your DUNS numbers also carries a status. The status for the DUNS number associated with a Smart Meter as ROR must be Active in order for you to view and access data for that Smart Meter.

Your Account Status, your Company Status, and the status for at least one of your DUNS numbers must all be Active for you to gain access to SMT. You can view the status of each DUNS number for which you have access by viewing your Profile. See Section 6.2 Changing Your Personal Profile. Figure 14 describes the various DUNS Status values.


DUNS Status Values	
Pending	<p>A new DUNS number has been added by one of your Company's Administrators and is currently awaiting approval by a TDSP Administrator.</p>  <p>NOTE: If the TDSP Administrator declines the request or does not approve the request within 14 days, the first Administrator will be notified by email and the registration request will be deleted. If this occurs, the first Administrator must re-register the new REP Company.</p>
Active	A TDSP Administrator has approved the DUNS number. All REP accounts with access to this DUNS will be able to see data from Smart Meters for which this DUNS is the current ROR.
Suspended	The DUNS has been suspended at the request of the TDSP. An email notification has been sent to the email address listed in your Company Profile. The DUNS can only be re-instated by the SMT Team with TDSP's approval. Once re-instated, the DUNS Status will return to Active.
Revoked	The DUNS has been revoked at the request of the TDSP. REP Accounts that have access to this one DUNS only have also been revoked. This action cannot be undone. To gain access to SMT, you must re-register.

Figure 14: DUNS Status Values



## 5 Managing Accounts for Your Company

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If you have a REP Account and are an Administrator for your Company, you are responsible for managing access to your Company data. Managing access includes approving and declining access requests as well as maintaining access of existing Accounts.

Anyone can request access to your Company Account but approval must be granted by one of the Company Administrators. New registrants will request access as either a User or an Administrator.

For additional information on Account, Company, and DUNS status values, see Section 4 Status Values.

### 5.1 Users vs. Administrators

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Company Users can:

- Update and view their own personal profile
- View the Company profile
- Access usage, meter, and premise information for the Smart Meters that are associated with your Company, if your Company Administrator has granted you authorization to the DUNS that is the current ROR

Company Administrators can:

- Update and view their own personal profile
- Update and view the Company profile
- Add and remove DUNS numbers for your Company
- Access usage, meter, and premise information for all Smart Meters that are associated with your Company when your Company is their REP of Record (ROR)
- Approve/decline new registrations requesting access to your Company
- Grant permissions to Company users
- Suspend/re-instate/revoke Accounts that have previously been granted access to your Company.

### 5.2 Approving and Declining New Account Requests

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When a person registers for a REP Account and requests access to your Company, that request must be approved or declined by one of the Company Administrators. Email notification is sent to the email address in the Company Profile whenever a registration request occurs.

Select	First Name	Last Name	Account Type	Status	Request Date
<input type="checkbox"/>	Ben	Bell	rep_user	Pending	Mon Oct 06 14:34:10 CDT 2014



Figure 15: Pending Approvals



Figure 16: Edit User Account Permission



NOTE: If a Company Administrator does not take action on a pending registration request within 14 days, the requestor will be notified by email and the registration request will be deleted. If this occurs, the requestor must re-register.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Pending Approval' from the left menu
3	Select checkbox (required)  Select the checkbox next to one or more Accounts. Edit Permissions is only available for one Account at a time. Approve and Decline will function for multiple Accounts at the same time.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
4	<p>Click 'Edit Permissions' button, 'Approve' button, or 'Decline' button</p> <p>Edit Permissions will display the Account Profile information for the Pending Account. You will be able to approve or decline this Account from the Edit Permissions screen. <a href="#">Go to Step 5.</a></p> <p>Approve will approve all selected Accounts without viewing the Account owner's details. The selected Accounts will have access to <u>all</u> of the Company's DUNS numbers and will not have Energy Data or In-Home Device Services permission.</p> <p> NOTE: If you wish to include comments that will be sent to the Account owner upon approval or to grant Energy Data or In-Home Device Services permissions to the new user, you must approve the Account through the Edit Permissions screen.</p> <p>Decline will require you to enter comments to be sent to the registrant about why the request is being declined. <a href="#">Go to Step 11.</a></p>
5	<p><a href="#">From Step 4 / Edit Permissions</a></p> <p>DUNS Numbers</p> <p>Select the checkbox next to each DUNS Number if you wish to grant this user access to Smart Meters for which this DUNS is ROR. You must select at least one DUNS Number if you intend to Approve this request.</p> <p> NOTE: If you approve a user without Editing Permissions (see Step 4), the user will have access to all of the Company's DUNS. However, you may edit the user's permissions later through the option 'Manage Users' (for more information see Section 5.4 Altering Account Status for Existing Accounts)</p>

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
6	<p>3<sup>rd</sup> Party - Access to Energy Data (optional)</p> <p>Select this checkbox if you wish to grant this user access to:</p> <ul style="list-style-type: none"> <li>▪ Create new Energy Data Agreements</li> <li>▪ Manage existing Energy Data Agreements</li> <li>▪ Access energy data reports and meter/premise data</li> </ul> <p>All administrators have access to all functions related to Energy Data Agreements automatically. You can only use this checkbox to grant access to users.</p> <p> NOTE: If you approve a user without Editing Permissions (see Step 4), the user will have read-only access to all your Energy Data Agreements. However, you may edit the user's permission later through the option 'Manage Users' (for more information see Section 5.4 Altering Account Status for Existing Accounts).</p>
7	<p>3<sup>rd</sup> Party - Access to In-Home Device Services (optional)</p> <p>Select this checkbox if you wish to grant this user access to:</p> <ul style="list-style-type: none"> <li>▪ Create In-Home Device and In-Home Device Services Agreements</li> <li>▪ Manage existing In-Home Device and In-Home Device Services Agreements</li> <li>▪ Add and Remove In-Home Devices to your customers' Smart Meters</li> </ul> <p>All administrators have access to all functions related to In-Home Device and In-Home Device Services Agreements automatically. You can only use this checkbox to grant access to users.</p> <p> NOTE: If you approve a user without Editing Permissions (see Step 4), the user will have read-only access to the In-Home Device and In-Home Device Services Agreements, but will not have access to Add and Remove In-Home Devices. However, you may edit the user's permissions later through the option 'Manage Users' (for more information see Section 5.4 Altering Account Status for Existing Accounts)</p>
8	<p>Access to SMT Portal (required)</p> <p>Select 'Approve' or 'Decline' from the dropdown box.</p>
9	<p>Comments (required if the Account is being declined)</p> <p>The Account owner will be notified via email when the Account is approved or declined. Any comments entered here are included in that email. If the Account is being approved, the comments are optional.</p>


SMT Procedure – Approving and Declining New Account Requests	
Step	Action
10	<p>Click 'Save Account' button</p> <p>If the Account is approved, the Account Status will change to 'Approved' and an email notification will be sent to the Account owner along with a temporary password. If the Account is declined, the Account will be deleted and an email notification will be sent to the Account owner. Either way, the Pending Request is removed from the Administrator's pending work queue.</p> <p> NOTE: The Company Administrators share the Administrator's pending work queue. If any one (1) Administrator approves or declines a registration request, the request is removed from the Administrator's pending work queue for all Company Administrators.</p>
11	<p><a href="#">From Step 4 / Decline</a></p> <p>Comments (required)</p> <p>The Account owner will be notified via email when the Account is declined. Comments entered here are included in that email and are meant to give the Account owner a reason why the request was declined.</p>
12	<p>Click 'Decline' button</p> <p>All Accounts selected on the pending work queue will be deleted. An email notification will be sent to each of the Account owners. The Pending Request is removed from the Administrator's pending work queue.</p>

Figure 17: SMT Procedure – Approving and Declining New Account Requests

### 5.3 Displaying Your Company's Account List

If you are a Company Administrator, your Company's Account List contains all of the Accounts that are associated with your Company. Figure 18 shows an example of an Account list when displayed in SMT.

<input type="checkbox"/>	User ID	First Name	Last Name ▼	Email	Type	Account Status
<input type="checkbox"/>	jdoe	Jane	Doe	jdoe@company.com	User	Active
<input type="checkbox"/>	ssmith	Steve	Smith	ssmith@company.com	User	Active

Figure 18: Account List

If you have 25 or fewer Accounts associated with your Company, your Account List will automatically display. If you have more than 25 Accounts, you will need to search for Accounts to display in your list.

SMT Procedure – Displaying Your Account List (25 or fewer Accounts)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu

Figure 19: SMT Procedure – Displaying Your Account List (25 or fewer Accounts)

If you have 25 or more Accounts associated with your Company, you will see a Search screen. You must search for a specific Account or a group of Accounts to populate the search results with an Account List. You may also click the link 'Show All' to display all Accounts associated with your Company.



**NOTE:** If you have more than 500 Accounts associated with your Company, the 'Show All' link will not appear. In this case, you must search for a specific Account or group of Accounts.

SMT Procedure – Displaying Your Account List (Show All)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu
3	Click 'Show All' link

Figure 20: SMT Procedure – Displaying Your Account List (Show All)


SMT Procedure – Displaying Your Account List (Search for Accounts)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu
<p>Enter search criteria in one (1) or more of the following fields. In each search field, you may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all entries that begin with 'abc'</p> <p>a*bc shows all entries that begin with 'a' and end with 'bc'</p> <p>*abc shows all entries that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search field.</p>	
3	<p>First Name</p> <p>Enter the First Name on the Account to be located.</p>





SMT Procedure – Displaying Your Account List (Search for Accounts)	
Step	Action
4	Last Name Enter the Last Name on the Account to be located.
5	Email Address Enter the Email Address on the Account to be located.
6	User ID Enter the User ID on the Account to be located.
7	DUNS Number Check the box next to the DUNS Number to narrow your search to only Accounts that have access to this DUNS.
8	Account Status Select an Account Status from the dropdown list. Your search results will include only Accounts with the selected status. For more information on Account Status values, see Section 4.1 Account Status.
9	Click 'Search' button OR Select a Letter to find the user's last name in the list Select a letter to display all Accounts with Last Names that begin with that letter.

Figure 21: SMT Procedure – Displaying Your Account List (Search for Accounts)

#### 5.4 Altering Account Status for Existing Accounts

Company Administrators can alter the Account Status for any User or Administrator Account that is associated with the Company. For more information on Account Status values, see Section 4.1 Account Status.

SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
 <b>NOTE:</b> You must have an Account List displayed before you can complete these steps. For information on displaying your Account List, see Section 5.3 Displaying Your Company's Account List.	
1	Select checkbox (required) Select the checkbox next to one or more Accounts. Edit User is only available for one Account at a time. Suspend, Reinstate, and Revoke is available for multiple Accounts at the same time.

SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
2	<p>Click 'Edit User' button, 'Suspend' button, 'Reinstate' button, or 'Revoke' button</p> <p>Edit User will display the Account Profile information for the selected Account. You will be able to change the status of the Account from the Edit User screen. <a href="#">Go to Step 3.</a></p> <p>Suspend will require you to enter comments to be sent to the Account owner about why he is being suspended.</p> <p> NOTE: You cannot suspend an Account that is already Suspended or Revoked. <a href="#">Go to Step 9.</a></p> <p>Reinstate will change the Account Status of selected Accounts to 'Active'.</p> <p> NOTE: Account Status must be Suspended in order to be reinstated.</p> <p> NOTE: If you wish to include comments that will be sent to the Account owner upon being reinstated, then you must alter the Account Status through the Edit User screen.</p> <p>Revoke will require you to enter comments to be sent to the Account owner about why he is being revoked.</p> <p> NOTE: Revoking an Account is permanent and cannot be undone. <a href="#">Go to Step 9.</a></p>
3	<p><a href="#">From Step 2 / Edit User</a></p> <p>DUNS Numbers (at least one required)</p> <p>Select the checkbox next to each DUNS Number if you wish to grant or remove this user's access to Smart Meters for which this DUNS is ROR. You must select at least one DUNS Number for the Account. If you wish to remove the Account's access to all DUNS, then you should Suspend or Revoke the Account.</p>










SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
4	<p>3<sup>rd</sup> Party - Access to Energy Data (optional)</p> <p>Select this checkbox if you wish to grant this user access to:</p> <ul style="list-style-type: none"> <li>▪ Create new Energy Data Agreements</li> <li>▪ Manage existing Energy Data Agreements</li> <li>▪ Access energy data reports and meter/premise data</li> </ul>
5	<p>3<sup>rd</sup> Party - Access to In-Home Device Services (optional)</p> <p>Select this checkbox if you wish to grant this user access to:</p> <ul style="list-style-type: none"> <li>▪ Create In-Home Device and In-Home Device Services Agreements</li> <li>▪ Manage existing In-Home Device and In-Home Device Services Agreements</li> <li>▪ Add and Remove In-Home Devices to your customers' Smart Meters</li> </ul>
6	<p>Web Portal Access (required)</p> <p>Select the access from the dropdown box.</p> <p> NOTE: The dropdown box values will differ depending on the Accounts current status. For example, Reinstate will not be shown as an option unless the current Account Status is Suspended.</p>
7	<p>Comments (required if the Account is being suspended or revoked)</p> <p>The Account owner will be notified via email when the Account Status is changed. Any comments entered here are included in that email.</p>
8	Click 'Save Account' button
9	<p><a href="#">From Step 2 / Suspend or Revoke</a></p> <p>Comments (required)</p> <p>The Account owner will be notified via email when the Account Status is changed. Comments entered here are included in that email and are meant to give the Account owner a reason why the action was taken.</p>
10	<p>Click 'Suspend' button or 'Revoke' button</p> <p> NOTE: Only one of these buttons will show on your screen.</p> <p>All Accounts selected on the Account list will be suspended or revoked. An email notification will be sent to each of the Account owners.</p>

Figure 22: SMT Procedure – Changing Account Status for Existing Accounts

## 5.5 Changing the Company Profile

Administrators may change the Company Profile information. Users may view but not change the Company Profile.

SMT Procedure – Changing the Company Profile	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Company Profile' from the left menu
3	Click 'Edit Profile' button
4	Company Name (required) Change your Company Name.
5	Address 1 (required) Change the primary address for your Company.
6	Address 2 Change the second line of the address for your Company.
7	City (required) Change the city for your Company address.
8	State (required) Select a new state for your Company address from the dropdown box.
9	Zip Code (required) Change the zip code for your Company address.
10	Country (required) Select a new country for your Company address from the dropdown box.
11	Phone (required) Change the preferred contact phone number for your Company.
12	Account Email Address (required) Change the preferred Company email address.   NOTE: SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).

SMT Procedure – Changing the Company Profile	
Step	Action
13	<p>Re-enter Email Address (required if Account Email Address is changed)</p> <p>This entry must exactly match the previous entry for Account Email Address.</p>
14	<p>DUNS (at least one required)</p> <p>Add DUNS: Enter a new DUNS Number and Click 'Add DUNS' button. The new DUNS will be added with DUNS Status = Pending. When the Company Profile is saved, the TDSP Administrators will be notified that your Company is awaiting approval of the new DUNS.</p> <p> NOTE: The new DUNS must be approved by a TDSP Administrator before REP Users can access Smart Meters with this DUNS as ROR. Once approved, all Administrators for the REP Company will automatically have access to the new DUNS. The REP Company Administrators must individually grant access to the new DUNS to each of the REP User Accounts. See Section 5.4 Altering Account Status for Existing Accounts.</p> <p>Remove DUNS: Select the checkbox next to the DUNS to be removed and click the 'Remove DUNS' button. When the Company Profile is saved, the DUNS number will be removed.</p> <p> NOTE: Removing the DUNS from the Company Profile will automatically remove the DUNS access from all of the REP Administrator and User Accounts.</p>
15	<p>Company URL (optional)</p> <p>You may provide the URL of your company's website or change the one you provided before.</p> <p> NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to your Company's website.</p>
16	<p>Privacy Policy URL (optional)</p> <p>You may provide the URL of your company's Privacy and Security Policy webpage or change the one you provided before.</p> <p> NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to the Privacy Policy page of your Company's website.</p>



SMT Procedure – Changing the Company Profile	
Step	Action
17	<p>Upload Company Logo (optional)</p> <p>You may provide an image of your company’s logo or change the one you provided before. The image file you want to upload must be less than 20KB.</p> <p> NOTE: Your company logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.</p>
18	<p>Privacy Seal Requirements (optional)</p> <p>Check this box if your company has met the requirements of the Trusted Smart Grid Privacy Program by TRUSTe and is certified to use the Trusted Smart Grid Privacy Seal. For more information about the TRUSTe certification program, go to <a href="http://www.truste.com">www.truste.com</a>.</p> <p> NOTE: If you check this box, the Smart Grid Privacy Seal logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.</p>
19	Click ‘Save Profile’ button

Figure 23: SMT Procedure – Changing the Company Profile

## 6 Managing Your Personal Account

The personal information that you entered when you registered is stored in your profile. Your Company Administrators can change the Status of your Account and grant and remove access to DUNS Numbers and Third-Party related functionalities, but only you can alter your personal profile information.

For more information on Account Status, see Section 4.1 Account Status.

You also have the ability to unlock your own Account and to recover forgotten User IDs or Passwords.

### 6.1 Changing Your Password

SMT Procedure – Changing Your Password	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'My Profile' from the left menu
3	Click 'Change Password' button
4	Current Password (required) Enter your current password.
5	New Password (required) Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID. Your new password cannot be the same as your previous password.
6	Re-enter New Password (required) This entry must exactly match the previous entry for New Password.
7	Click 'Save Password' button

Figure 24: SMT Procedure – Changing Your Password

### 6.2 Changing Your Personal Profile



**NOTE:** You cannot change your User ID. If you need a different User ID then you will have to register for a new Account.

SMT Procedure – Changing Your Personal Profile	
Step	Action
1	Navigate to the 'My Account' tab

SMT Procedure – Changing Your Personal Profile	
Step	Action
2	Select 'My Profile' from the left menu
3	Click 'Edit Profile' button
4	First Name (required) Change your first name.
5	Middle Initial Change your middle initial.
6	Last Name (required) Change your last name.
7	Suffix Change any name suffix (Jr, Sr, III).
8	Phone Change your preferred contact phone number.
9	Email Address (required) Change your preferred email address.
10	Re-enter Email Address (required if Email Address is changed) This entry must exactly match the previous entry for Email Address.
11	DUNS: DUNS Number and DUNS Status This list shows the DUNS Numbers to which you have access. If the DUNS is in the list, then your Company Administrators have granted you access. For more information on the DUNS Status field, see Section 4.3 DUNS Status.
12	Access to Energy Data This field shows whether you have access to Energy Data functions. Your Company's Administrator can grant you access or remove your access to Energy Data functions.
13	Access to In-Home Device Services This field shows whether you have access to In-Home Device Services functions. Your Company's Administrator can grant you access or remove your access to In-Home Device Services functions.

SMT Procedure – Changing Your Personal Profile	
Step	Action
14	<p>Click 'Change Password' button, 'Change Security' button or 'Save Profile' button</p> <p>Change Password will display a new screen that will allow you to change your password. <a href="#">Go to Step 15.</a></p> <p>Change Security will display a new screen that will allow you to change your Security Question and Answer. <a href="#">Go to Step 19.</a></p> <p>Save Profile will save all changes that you have made to your Account Profile</p>
15	<p><a href="#">From Step 14 / Change Password</a></p> <p>Current Password (required)</p> <p>Enter your current password.</p>
16	<p>New Password (required)</p> <p>Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID.</p>
17	<p>Re-enter New Password (required)</p> <p>This entry must exactly match the previous entry for New Password.</p>
18	<p>Click 'Save Password' button</p> <p>Your password is changed and you are returned to the Edit Profile screen. <a href="#">Return to Step 14.</a></p>
19	<p><a href="#">From Step 14 / Change Security</a></p> <p>Security Question (required)</p> <p>Select a Security Question from the dropdown box.</p>
20	<p>Security Question Answer (required)</p> <p>Enter an Answer for the Security Question that you can remember. The Answer is not case sensitive. In the future, if you forget your password, you will be asked for the Answer to your Security Question.</p>
21	<p>Click 'Save Question' button</p> <p>Your security information is changed and you are returned to the Edit Profile screen. <a href="#">Return to Step 14.</a></p>

Figure 25: SMT Procedure – Changing Your Personal Profile

### 6.3 [Forgot Password / Unlocking Your Account](#)

If you forget your password, you can request that a new temporary password be generated for your Account.

If you attempt to login with an incorrect password more than 4 times, your Account Status will be set to 'Locked'. You can also use the Forgot Password procedure to unlock your Account and reset your password. For more information on Account Status, see Section 4.1 Account Status.


SMT Procedure – Forgot Password / Unlocking Your Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a> or <a href="http://private.SmartMeterTexas.com">private.SmartMeterTexas.com</a>
2	User ID (required) Enter your User ID in the Login area.
3	Click 'Forgot Password' link Your Security Question from your Account Profile will be displayed.
4	Answer (required) Enter the answer to the displayed security question. The answer must match the Security Question Answer from your Account Profile.
5	Click 'Submit' button  If the answer to your security question is correct, a new temporary password will be generated and sent to the Email Address that is contained in your Account Profile. If your Account was locked, then your Account Status will be set to 'Active'.   NOTE: If you no longer have access to the Email Address that is listed in your Account Profile and you cannot retrieve your new temporary password, then you must register for a new Account.

Figure 26: SMT Procedure – Forgot Password / Unlocking Your Account



## 6.4 Forgot User ID

If you forget your User ID, you can request that it be sent to the Email Address in your Account Profile.


SMT Procedure – Forgot User ID	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a> or <a href="http://private.SmartMeterTexas.com">private.SmartMeterTexas.com</a>
2	Click 'Forgot User ID' link
3	Email Address (required) Enter the Email Address that is stored in your Account Profile.
4	Click 'Submit' button  If an Account is found that matches the Email Address entered, then an email containing the User ID will be sent to that Email Address. If multiple Accounts are found, then the email notification will list all User IDs associated with that email address.   NOTE: If you no longer have access to the Email Address that is listed in your Account Profile and you cannot retrieve your forgotten User ID, then you must register for a new Account.

Figure 27: SMT Procedure – Forgot User ID

## 7 Creating Meter and Premise Information Reports

Information about individual Meters and Premises is available in SMT for each one of the Smart Meters that you can access as a REP of Record (ROR). To request a Meter and/or Premise Information Report you need to display your Meter List in the 'My Account' Tab. See Section 3.1 Displaying Your Customer Meter List – My Account.



NOTE: To learn how to access the Meter and Premise Information for Smart Meters associated with a Customer Agreement, refer to the SMT Third-Party Service Provider User Guide.

### 7.1 Viewing Meter and Premise Information

You can only view Meter or Premise Information for one (1) meter at a time. You must first display your Meter List to be able to View Meter and Premise Information. The view functionality is not valid with Search by Importing a File.

SMT Procedure – Viewing Meter and Premise Information (1 Meter)	
Step	Action
<p>NOTE: You must have a Meter List displayed before you can complete these steps. For information on displaying your Meter List, see Section 3.1 Displaying Your Customer Meter List – My Account.</p>	
1	<p>Select checkbox (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
2	<p>Click either the 'View Premise Information' button, or the 'View Meter Information' button.</p> <p>When selecting the 'View Premise Information' button, the information related to the premise (or service address) will be displayed.</p> <p>When selecting the 'View Meter Information' button, the information related to the meter will be displayed.</p> <p> NOTE: You can see a brief description by positioning your mouse over the field name.</p>

Figure 28: SMT Procedure – Viewing Meter and Premise Information (1 Meter)

### 7.1.1 Premise Information

Figure 29 describes the values that are displayed with Premise Information.

Premise Information Values	
Field Name	Brief Description
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
Service Voltage	Voltage at the Premise (displayed if available)
Premise Status	If the value is A or a, it means the Premise is active; if the value is I or i, it means that the Premise is inactive
Time Zone	The time zone where the premise is located
House Number	The House Number of the service address (displayed if available)
Fractional House Address	Designator that can be used to distinguish premises with the same address (displayed if available)
Leading Directional	The directional indicator (typically N, S, E, W) that precedes the street name (displayed if available)
Street Name	The street name for the service address
Street Type	The street type (e.g. St, Ave, Ln) for the service address (displayed if available)
Trailing Directional	The directional indicator that occurs after the street type (displayed if available)
Unit Designation	Denotes individual premises in multi-unit addresses, for example in apartment buildings (displayed if available)
City	The city or locality of the service address
State	The state of the service address
ZIP Code	The primary, five digit ZIP Code of the service address
Zip Code + 4	The secondary, four digit ZIP Code of the service address (displayed if available)
Meter Read Cycle	The cycle number corresponding to a meter read cycle date when data is reported for the monthly billing period
Load Profile	Describes the load profile at the service location as per ERCOT specifications
Rate Class/Code	Code that identifies the tariff used by the TDSP billing this location (displayed if available)
AMS Profile Effective Date	Effective start date for SMT to start sending usage data to ERCOT

Premise Information Values	
Field Name	Brief Description
	(displayed if available)

Figure 29: Premise Information Values

### 7.1.2 Meter Information

Figure 30 describes the values that are shown with Meter Information.

Meter Information Values	
Field Name	Brief Description
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
Meter Number	Manufacturer Serial Number of the Meter
Utility Meter Number	Meter Identifier used by the TDSP
kWh Meter Multiplier	A multiplying factor that is used to convert kWh readings to kWh consumption on certain (instrument rated) meters
Number of Channels	Number of Channels the Meter is Configured for
Meter Manufacturer Name	Company that manufactured the Meter
Last Meter Test Date	Last date the Meter was manually tested
Meter Class (Ampacity)	The maximum current (amperes) the meter can register continuously without creating an unsafe condition at the meter socket
Meter Installation Date	Date Meter was Installed
Meter Activation Date	Date when Meter started sending Usage Information to SMT
Technology/Communicator Indicator	Indicator of the type of communication used to transport data from the Meter
Instrument Rated	Indicator of whether or not the Meter requires a Current Transformer / Potential Transformer
Ratio of Current Transformers	The ratio of the primary to secondary transformer windings of a current transformer that is on the source side of an instrument rated meter
Ratio of Potential Transformers	The ratio of the primary to secondary transformer windings of a potential or voltage transformer that is on the source side of an instrument rated meter


Meter Information Values	
Field Name	Brief Description
ESI Firmware Version	The firmware version of the ZigBee communication module
HAN Protocol (ZigBee or HomePlug)	Type of HAN Protocol enabled (displayed if available)
Smart Energy Profile	The HAN compliance specification that this meter supports
Interval Setting	How often the Meter is recording usage (length in minutes of the interval)
In flow / Out flow (DG) Capable	Indicator of whether or not the Meter is able to handle both consumption and generation metering
Distributed Generation Channel	The channel number on the meter of the Distributed Generation channel (displayed if available)
Remote disconnect / connect Capable	Indicator of whether or not the Meter is enabled for remote disconnects
Meter Status	If the value is E or e, it means that the Meter is energized; If the value is D or d, it means that the Meter is de-energized (displayed if available)
Meter Phases	The number of phases that the meter handles, either 1, 2 or 3 (displayed if available)
Meter Model	Meter Model Identifier (displayed if available)
Last Updated	Last date and timestamp that the Meter Information was updated

Figure 30: Meter Information Values

## 7.2 Print or Export from View

If you are currently viewing Meter or Premise Information online, you may print the information or export the information to a file.

### SMT Procedure – Printing or Exporting from View – Meter and Premise Information



Step	Action
	<b>NOTE:</b> You must have Meter or Premise information for a Smart Meter showing on your screen before you can execute this procedure. See Section 7.1 Viewing Meter and Premise Information for more information on how to view Meter and Premise information.

SMT Procedure – Printing or Exporting from View – Meter and Premise Information	
Step	Action
1	<p>Click 'Print' button or 'Export' button</p> <p>Print will cause your displayed report to print.</p> <p>Export will cause your displayed report to be immediately downloaded to a CSV file. For information on using SMT CSV files, see Appendix A.2 Opening a CSV File.</p>

Figure 31: SMT Procedure – Printing or Exporting from View – Meter and Premise Information

### 7.3 Exporting Reports

If you are working with data from multiple Smart Meters, you may choose to Export the Meter and Premise Information without first viewing online. If you choose to Export, you may select multiple Smart Meters to be processed for your request at the same time.

SMT Procedure – Requesting Reports for Export – Premise and Meter Information	
Step	Action
	 NOTE: You must have a Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see Section 3.1 Displaying Your Customer Meter List – My Account.
1	<p>Select checkbox (required)</p> <p>Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.</p>
2	<p>Click 'Export Information' button</p> <p>A new screen is displayed allowing you to select Types of Information for this export.</p>
3	<p>Premise Information</p> <p>Select the checkbox to request the Premise Information for each of the previously selected Smart Meters.</p> <p>Meter Information</p> <p>Select the checkbox to request the Meter Information for each of the previously selected Smart Meters.</p> <p> NOTE: You may request either one or both Premise and Meter Information reports.</p>

SMT Procedure – Requesting Reports for Export – Premise and Meter Information	
Step	Action
4	<p>Click 'Export' button</p> <p>A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. For information on retrieving your report, see Section 8.4.1 Retrieving Exported Reports.</p>

Figure 32: SMT Procedure – Requesting Reports for Export – Premise and Meter Information

## 8 Creating Usage Reports

This section describes how to access the usage data of your Customer’s Smart Meter if your Company is the REP of Record (ROR). There are three (3) types of Usage Data Reports available on SMT:

- Daily Usage (15 min intervals) Report
- Daily Meter Reads Report
- Monthly Usage Report

You may view or request exports of these reports online, or request exports via Application Programming Interfaces (API).



NOTE: To learn how to access usage data for Smart Meters associated with an active Energy Data Agreement, refer to the SMT Third-Party Service Provider User Guide.

### 8.1 Displaying Your Customer Meter List – Usage

Your Customer Meter List contains all of the Smart Meters that are associated with your Account. For a Smart Meter to be associated with your Account, your Company must be the REP of Record (ROR) as reported by the TDSPs. Figure 33 shows an example of a Customer Meter List when displayed in SMT.

<input type="checkbox"/>	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	123 Demo Drive	Anytown	TX	88888880000000001	888888001
<input type="checkbox"/>	123 Demo Drive	Anytown	TX	88888880000000002	888888002
<input type="checkbox"/>	123 Demo Drive	Anytown	TX	88888880000000003	888888003

Figure 33: Customer Meter List – Usage

If your Company is the REP of Record (ROR) for more than 25 Smart Meters, you will need to search for meters to display in your list. Otherwise, your Meter List will be displayed automatically.

SMT Procedure – Displaying Customer Meter List (25 or fewer meters) – Usage	
Step	Action
1	Navigate to the ‘Usage’ tab
2	Select ‘Customer Meters (ROR)’ from the left menu

Figure 34: SMT Procedure – Displaying Customer Meter List (25 or fewer) – Usage

#### 8.1.1 Searching for Meters – Usage

If your Company is the ROR for more than 25 Smart Meters, a Search screen will be displayed. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Customer Meter List. You also may select the link ‘Show All’ to display all the Smart Meters.





NOTE: If you have more than 500 Smart Meters, the 'Show All' link will not appear. In this case, you must search for a specific meter or group of meters. A search can be performed on up to 100 meters or ESI IDs if you enter the ESI ID values on the search screen. To learn how to conduct a search on more than 100 meters read the Section 8.1.2 Search for Meters by Importing a File – Usage.

SMT Procedure – Displaying Customer Meter List (Show All) – Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Click 'Show All' link

Figure 35: SMT Procedure – Displaying Customer Meter List (Show All) – Usage

SMT Procedure – Displaying Customer Meter List (Search for Meters) – Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Select type of meter identifier (required) Select to search by either ESI ID or Meter Number.
4	Type one or more meter numbers (required)  Enter up to 100 ESI IDs or Meter Numbers (but not both) to correspond with your search type. Values should be separated by a comma (.).  You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123).  123* shows all ESI IDs/Meter Numbers that begin with '123'  1*23 shows all ESI IDs/Meter Numbers that begin with '1' and end with '23'  *123 shows all ESI IDs/Meter Numbers that end with '123'  You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.
5	Click 'Search' button

Figure 36: SMT Procedure – Displaying Customer Meter List (Search for Meters) – Usage

### 8.1.2 Search for Meters by Importing a File – Usage

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meter information. You can then import that file and search for specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one value that identifies a Smart Meter – either the ESI ID or the Meter Number. ESI IDs and Meter Numbers cannot be mixed in the same file. Following is an example of the format for an ESI ID file:

```
99999990000000116
99999990001234567
99999990000000789
```

Here is an example of the format for a Meter Number file:

```
900000116
900000123
200001987
```

For help creating a CSV file, see Appendix A: Working with CSV Files.



NOTE: SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters (ROR)' from the left menu
3	Select type of meter identifier (required) Select to search by either ESI ID or Meter Number. All entries in the corresponding import file will be interpreted as this type of value.
4	Import Meter(s) from a file (required) The file type must be CSV. Click 'Browse' to select the file from your computer. For help creating a CSV file, see Appendix A: Working with CSV Files.
5	Click 'Import' button Import the file and search for the designated meters in your Meter List. The results of your search will be consolidated in a file and the following message will appear in your Search Results:  <input type="checkbox"/> The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Report(s) to use the search results to request Usage Reports.  Select the checkbox if you want to create and export the usage data reports for all of the Smart Meters that are found successfully from your search. For information on exporting reports, see Section 8.4 Exporting Reports.

Figure 37: SMT Procedure – Search by Importing a File

## 8.2 Viewing Reports

If you only have one (1) Smart Meter associated with your Account, then the Daily Usage (15 min intervals) report for that Smart Meter will automatically display upon selecting the Usage tab.

SMT Procedure – Viewing Reports (1 meter)	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters (ROR)' from the left menu

Figure 38: SMT Procedure – Viewing Reports (1 meter)

If you have more than one (1) Smart Meter associated with your Account, then you must first display your Customer Meter List before you can view a report online. Since you can only view reports online for one (1) meter at a time, the view function is not valid with Search by Importing a File. For more information on displaying your Meter List, see Section 8.1 Displaying Your Customer Meter List – Usage





SMT Procedure – Viewing Reports (more than 1 meter)	
Step	Action
	<b>NOTE:</b> You must have a Meter List displayed before you can complete these steps. For information on displaying your Meter List, see Section 8.1 Displaying Your Customer Meter List – Usage.
1	Select checkbox (required) Select the checkbox next to the Smart Meter. You may view reports for only one (1) Smart Meter at a time.
2	Click 'View Report' button The Daily Usage (15 min intervals) report is displayed.

Figure 39: SMT Procedure – Viewing Reports (more than 1 meter)

Report Options can be selected from the top portion of any Report screen. You can change these options to view different reports for the Smart Meter that was selected. If you want to see a report for a different Smart Meter, you must go back to your Meter List and select a different meter.

SMT Procedure – Changing Report Options	
Step	Action

SMT Procedure – Changing Report Options	
Step	Action
 NOTE: You must have a report displayed before you can complete these steps.	
1	<b>Report Type (required)</b> Select the desired report from the dropdown box. You may select 'Daily Usage (15 min intervals)', 'Daily Meter Reads', or 'Monthly Usage'
2	<b>View (required)</b> Select 'Current Version' to see only the most current data available for the report. This is the only data that your Customers will see. Select 'Version Updates' to see the current plus any previous versions of data available for the report.
3	<b>Start Date (required)</b> Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 48 months prior to today for the Daily Usage and Daily Meter Reads reports, or more than 24 months prior to today for the Monthly Usage.  NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Customer's Smart Meter installation date, if it occurred after February 1, 2010.
4	<b>End Date (required)</b> Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.  NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSP companies. The data is made available through the SMT website within 2 calendar days. For example, usage data through midnight on Monday is available on Wednesday.

SMT Procedure – Changing Report Options	
Step	Action
5	<p>Click 'Update Report' button</p> <p>The report options are changed.</p> <p>If your selected options require a small amount of data (for example, less than 40 days for the Daily Usage report) then your report view will update immediately to reflect the new options.</p> <p>If your selected options require a large amount of data (for example, 6 months for the Daily Usage report) then your request will be run offline. In this situation, SMT will display a confirmation screen with an Order Number for your report request. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to the email. If you have requested the Daily Usage (15 min Interval) Report or the Daily Meter Reads Report, it will also be available on your FTP folder. For information on retrieving your report, see Section 8.4.1 Retrieving Exported Reports.</p>

Figure 40: SMT Procedure – Changing Report Options

### 8.2.1 Daily Usage (15 min intervals) Report

The Daily Usage (15 min intervals) report shows electricity usage for the selected Smart Meter in 15-minute segments. The report view displays 96 intervals (one for each 15-minute segment of a 24-hour day) of usage data for one day at a time. Use the Previous Day and Next Day buttons to navigate to other days within your selected date range.

Usage / [Customer Meters Search](#) / Customer Meters - Usage Report

**Customer Meters - Usage Report**

Address: XXXX XXXXXXXXXXXXXXXX  
 XXXXXXX, XX  
 ESIID: 00000000000000000000  
 Meter Number: 00000000  
 Meter Multiplier: 1

**Report Option**

Report Type:  *Use this dropdown to select another Report Type.*

View:  Current Version *Use the radial buttons to view the Current Version or the Version Updates for the Report Type you chose in the dropdown.*  
 Version Updates

Start Date: 04/30/2014  End Date: 04/30/2014

**Daily Usage (each 15 minutes) - Kilowatt Hours for 04/30/2014** *Use this Calendar tool to select different Start - End Dates for the Report.*



**On Demand Read Report**

Description	Date	Time	Meter Read	On Demand Usage (kWh)
On Demand Read				
Latest End of Day Read	04/30/2014	00:00:00	18114.07	

*These are the meter reads of the specified date/timestamp.*

Start Time	End Time	Usage(kWh)	Act./Est.
12:00 am	12:15 am	0.091	A
12:15 am	12:30 am	0.089	A
12:30 am	12:45 am	0.144	A
12:45 am	01:00 am	0.067	A
05:00 am	05:15 am	0.059	A
05:15 am	05:30 am	0.055	A
05:30 am	05:45 am	0.021	A
05:45 am	06:00 am	0.029	A
06:00 am	06:15 am	0.06	A
06:15 am	06:30 am	0.059	A
06:30 am	06:45 am	0.027	A
06:45 am	07:00 am	0.021	A
07:00 am	07:15 am	0.06	A

*The On Demand usage is the difference between the On Demand Read reported and the Latest End of Day Read multiplied by the meter's multiplier. E.g. (5074 - 5057.859 kWh) x 1 = 16.141.*

*The column indicates if the Usage (kWh) is Actual (A) or Estimate (E).*

*This is the kWh usage corresponding to each 15 Minute interval.*

*Use these buttons to see the Usage for the next block of days.*

*Click on Export to download the report that is being displayed.*

*Click on Print to print the report that is being displayed.*

Figure 41: Daily Usage (15 min intervals) Report

**8.2.2 Daily Meter Reads Report**

The Daily Meter Reads report shows electricity usage for the selected Smart Meter in 1-day segments. The report view displays up to 30 days of usage data at a time. Use the Previous and Next buttons to navigate to other days within your selected date range.



Usage / [Customer Meters Search](#) / Customer Meters - Usage Report

**Customer Meters - Usage Report**

Address: XXXX XXXXXXXXXXXXXXXXXXXX  
 XXXXXXXX, XX  
 ESIID: 00000000000000000000  
 Meter Number: 000000000  
 Meter Multiplier: 1

*Use this dropdown to select another Report Type.*

**Report Option**  
 Report Type:   
 View:  Current Version  Version Updates  
 Start Date: 04/01/2014    
 End Date: 04/30/2014

*Use the radial buttons to view the Current Version or the Version Updates for the Report Type you chose in the dropdown.*

**Daily Meter Reads - Kilowatt Hours per Day**  
*Use this Calendar tool to select different Start - End Dates for the Report.*

**Daily Meter Reads - Kilowatt Hours**

*Click on Update Report after you change the Report Type or the Start-End Dates.*

*Click the On Demand Read to request the latest On Demand Read report.*

*These are the meter reads of the specified date/timestamp.*

**On Demand Read Report**

Description	Date	Time	Meter Read	On Demand Usage (kWh)
On Demand Read				
Latest End of Day Read	04/30/2014	00:00:00	18114.07	

*The On Demand usage is the difference between the On Demand Read reported and the Latest End of Day Read multiplied by the meter's multiplier. E.g. (5074 - 5057.859 kWh) x 1 = 16.141.*

Date	Start Read	End Read	Usage (kWh)
04/01/2014	17931.812	17938.469	6.657
04/02/2014	17938.469	17944.115	5.646
04/03/2014	17944.115	17949.309	5.194
04/04/2014	17949.309	17955.223	5.914
04/05/2014	17955.223	17965.753	10.53
04/20/2014	18051.018	18056.266	5.248
04/21/2014	18056.266	18060.407	4.141
04/22/2014	18060.407	18065.218	4.811
04/23/2014	18065.218	18070.904	5.686
04/24/2014	18070.904	18075.664	4.76
04/25/2014	18075.664	18081.611	5.947
04/26/2014	18081.611	18088.436	6.825
04/27/2014	18088.436	18094.424	5.988
04/28/2014	18094.424	18101	6.576
04/29/2014	18101	18107.85	6.85
04/30/2014	18107.85	18114.07	6.22

*The usage data displayed on this column corresponds to the sum of the 96 intervals displayed on the Daily Usage (15 Min Interval) Report so it does not necessarily correspond to End Read - Start Read.*

*These are the meter reads for each day.*

*Use these buttons to see the Usage for the next block of days.*

*Click on Export to download the report that is being displayed.*

*Click on Print to print the report that is being displayed.*

Figure 42: Daily Meter Reads Report



NOTE: N/A is displayed if the Start and/or End read values for a day are not available.

### 8.2.3 Monthly Usage Report

The Monthly Usage report shows the total monthly electricity usage for the selected Smart Meter. You may request up to the previous 24 months of usage data.



NOTE: The Monthly Usage Report provides the monthly electricity usage that the TDSP reports to the Retail Electric Provider.

Usage / [Customer Meters Search](#) / Customer Meters - Usage Report

**Customer Meters - Usage Report**

Address: XXXX XXXXXXXXXXXX  
XXXXXXXX, XX  
ESIID: 00000000000000000000  
Meter Number: 00000000  
Meter Multiplier: 1

**Report Option**

Report Type: Monthly Usage

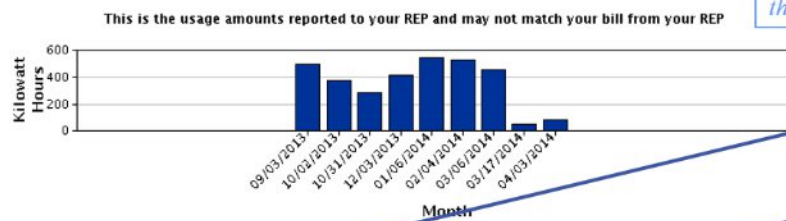
View:  Current Version  Version Updates

Start Date: Sep 2013

End Date: Sep 2014

Update Report

**Total Monthly Usage reported to your Retail Electric Provider - Kilowatt Hours**



Print Export On Demand Read

**On Demand Read Report**

Description	Date	Time	Meter Read	On Demand Usage (kWh)
On Demand Read				
Latest End of Day Read	04/30/2014	00:00:00	18114.07	

Start Date	End Date	Actual kWh	Metered KW	Billed KW	Metered KVA	Billed KVA
08/01/2013	09/03/2013	502	0	0	0	0
09/03/2013	10/02/2013	373	0	0	0	0
10/02/2013	10/31/2013	291	0	0	0	0
10/31/2013	12/03/2013	419	0	0	0	0
12/03/2013	01/06/2014	547	0	0	0	0
01/06/2014	02/04/2014	531	0	0	0	0
02/04/2014	03/06/2014	462	0	0	0	0
03/06/2014	03/17/2014	51	0	0	0	0
03/17/2014	04/03/2014	88	0	0	0	0

Print Export

Click on Print to print the report that is being displayed.

Click on Export to download the report that is being displayed.

Figure 43: Monthly Usage Report



NOTE: N/A is displayed if the kWh value for a month is not available.

**8.2.4 On Demand Read Report**



You may request an On Demand Read of a Customer's meter during your viewing of any one of the Usage Report online. SMT allows you to request an On Demand Read of a Customer's meter once every hour, 24 times in a day.





SMT Procedure – Requesting an On Demand Read	
 NOTE: You must have a report displayed before you can complete these steps.	
Step	Action
1	<p>Click 'On Demand Read' button</p> <p>Your On Demand Read request will be processed immediately. You may click the link provided 'Click here' to refresh the page after a few moments. The On Demand Read Report section will be refreshed with the latest data.</p> <p> NOTE: If the On Demand data is NOT successfully retrieved, you will see a message "Error! On Demand Read request could not be fulfilled. Please try again" displayed on the report screen. You may try to request again.</p> <p> NOTE: If you have submitted a request within an hour and the request has been processed by SMT, this button will be disabled. You may come back to the Usage Report screen to make another request for the same Customer's meter after an hour.</p>

Figure 44: SMT Procedure – Requesting an On Demand Read

### 8.3 Print or Export from View

If you are currently viewing a report online, you may print the report or export the report to a file.



SMT Procedure – Printing or Exporting from View	
Step	Action
 NOTE: You must have a report displayed before you can complete these steps. For more information on viewing reports, see Section 8.2 Viewing Reports.	





SMT Procedure – Printing or Exporting from View	
Step	Action
1	<p>Click 'Print' button or 'Export' button</p> <p>Print will cause your displayed report to print. The full report, as designated by the current Report Options, will print even though your view may only be displaying a specific page.</p> <p>Export will download your report to a CSV file immediately. The full report, as designated by the current Report Options, will export even though your view may only be displaying a specific page. The file will be in a CSV format. For information on using SMT CSV files, see Appendix A.2 Opening a CSV File.</p>

Figure 45: SMT Procedure – Printing or Exporting from View

## 8.4 Exporting Reports

If you have more than one Smart Meter associated with your Account, you may choose to Export your Report Request without first viewing online. If you choose to Export, you may select multiple Smart Meters to be processed for your report at the same time.

SMT Procedure – Requesting Reports for Export	
Step	Action
	 NOTE: You must have a Customer Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see Section 8.1 Displaying Your Customer Meter List – Usage.
1	<p>Select checkbox (required)</p> <p>Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.</p>
2	<p>Click 'Export Report(s)' button</p> <p>A new screen is displayed allowing you to select Report Options for this export.</p>
3	<p>Daily Usage checkbox</p> <p>Select the checkbox to request that the Daily Usage (15 min intervals) report be generated for each of the previously selected Smart Meters.</p>  NOTE: Either report or all reports may be requested at the same time.

SMT Procedure – Requesting Reports for Export	
Step	Action
4	<p>View (required)</p> <p>Select 'Current Version' to see only the most current data available for the report. This is the only data that your Customers will see.</p> <p>Select 'Version Updates' to see the current plus any previous versions of data available for the report.</p>
5	<p>Daily Usage Start Date (required if Daily Usage checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 48 months prior to today.</p> <p> NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.</p>
6	<p>Daily Usage End Date (required if Daily Usage checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p> <p> NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSP companies. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.</p>
7	<p>Daily Meter Reads checkbox</p> <p>Select the checkbox to request that the Daily Meter Reads report be generated for each of the previously selected Smart Meters.</p> <p> NOTE: Either report or all reports may be requested at the same time.</p>
8	<p>Daily Meter Reads Start Date (required if Daily Meter Reads checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 48 months prior to today.</p> <p> NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.</p>




SMT Procedure – Requesting Reports for Export	
Step	Action
9	<p>Daily Meter Reads end Date (required if Daily Meter Reads checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p> <p> NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSPs. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.</p>
10	<p>Monthly Usage checkbox</p> <p>Select the checkbox to request that the Monthly Usage report be generated for each of the previously selected Smart Meters.</p> <p> NOTE: Either report or all reports may be requested at the same time.</p>
11	<p>Monthly Usage Start Date (required if Monthly Usage checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 24 months prior to today.</p> <p> NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.</p>
12	<p>Monthly Usage end Date (required if Monthly Usage checkbox is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p>
13	<p>Click 'Export' button</p> <p>A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to the email. If you have requested the Daily Usage (15 min Interval) Report or the Daily Meter Reads Report, it will also be available on your FTP folder. For information on retrieving your report, see Section 8.4.1 Retrieving Exported Reports.</p>

Figure 46: SMT Procedure – Requesting Reports for Export

### 8.4.1 Retrieving Exported Reports

If you have submitted a Report Request that will run offline, when the report is completed, Green Button type reports will be sent via email to the Email Address in your Account Profile and Adhoc type reports will be sent to your FTP folder.

You can view the status of your Report Requests at any time. Go to the Usage Tab and Select Report Request Status from the left menu. Figure 47 shows an example of a Report Request Status screen. Following are the potential Report Request status values:

- Processing – Your request is still in process.
- Unsuccessful – Your request could not be processed. This is likely due to a temporary system or internet problem. Submit your request again. If you continue to receive this status, then refer to Section 11 Additional Help for information on how to contact the SMT Team.
- Complete – Your request is complete and the results are ready for download.



**NOTE:** The Details section of the Report Request Status screen will display a message if no data was found that matched the Report Options in your Report Request. This may happen, for example, if your selected date range is for a period prior to the installation of the Smart Meter.

Date Requested	Order ID	Status	Details
05/11/2016	a849e342ed3cbef08745065e	Completed	Your report has been generated
05/10/2016	fbf132e941067aed800cd02c	Completed	Your report has been generated

Figure 47: Report Request Status Screen

The results of your completed report request is sent to your email for Green Button type reports and to your SMT FTP Folder for Adhoc type reports typically within a few minutes. This is the same SMT FTPS site where you download the daily LSE files for your Smart Meters. Please work with your internal IT group if you need assistance to retrieve and distribute the files that are delivered to the FTP folder.

## 9 Managing In-Home Devices

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An In-Home Device, also known as Home Area Network (HAN) Device, is a piece of equipment with the capability to display usage information and/or receive informational messages and commands from the Retail Electric Provider to help Customers manage and control energy consumption. Examples of In-Home Devices include in-home display, programmable control thermostats, and smart appliances.

An active In-Home Device Agreement is required in order to add or remove an In-Home Device to your Customer's Smart Meter. To learn how to create and manage In-Home Device Agreements and In-Home Device Services Agreements, refer to the SMT Third-Party Service Provider User Guide.



**NOTE:** Administrators of your Company or authorized users are allowed to access In-Home Device Services functions. Contact your Company's Administrator to request the In-Home Device Services permission.

## 10 Supporting Your Customers

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The SMT user experience is somewhat different for Customers than it is for Retail Electric Providers (REP). For example, Customers must add their Smart Meters to their accounts by using the ESI ID and Meter Number showing on the bill. REPs, however, gain access to Smart Meters when they become the REP of Record (ROR).

### 10.1 Verifying Your Customer's Meter Information

---

SMT only has data for Smart Meters. Many Customers believe that they have Smart Meters yet receive errors when attempting to register for an SMT Account. The most common reasons for the error are:

- The Customer does not have a Smart Meter. A meter with a digital display is not necessarily a Smart Meter.
- A Smart Meter has been installed at the Customer location but it has not yet been provisioned by the TDSP. The provisioning process by the TDSPs can take up to 60 days after installation. The Smart Meter is not available in SMT until after the provisioning period.

If the Customer can not attach a Smart Meter, the Customer is referred to his REP for assistance.

As the REP, you can search in SMT for the Customer's Smart Meter by using either ESI ID or Meter Number. The Customer has to have a matching pair but you can search on either field. See Section 3.1 Displaying Your Customer Meter List – My Account. You may, for example, be able to search by ESI ID and see that the Customer is using an incorrect Meter Number (perhaps due to a recent meter exchange).

If you are unable to locate the Customer's Meter in SMT, then you must contact the TDSP for more information. The SMT Help Desk can not give you or your Customer any information about a meter that is not in the system. Only the TDSP can tell you the status of the Customer's Meter.

### 10.2 Removing a Smart Meter from a Customer Account

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Your Customer claims a Smart Meter by adding the meter to his SMT Account. The Customer provides the ESI ID and Meter Number found on the electric bill to add the Smart Meter. SMT will only allow a Smart Meter to be attached to one (1) SMT Customer Account at a time.

If a Customer tries to attach a Smart Meter that is already attached to another account, the Customer will get an error message and will be instructed to call his REP for assistance.

As the ROR, you can see the name and email address of the Customer that currently has the meter attached. See Section 3.1 Displaying Your Customer Meter List – My Account for more information.

If you determine that the SMT Customer Account currently has attached the Smart Meter in error, you can request that the TDSP remove the meter from the current SMT Customer Account by using the process as defined in the Retail Market Guide. When the TDSP takes this action, the SMT Customer losing the Smart Meter will be notified via email and your Customer will be able to attach the ESIID to their SMT account.

As soon as the Smart Meter is released, the rightful Customer may attach the Smart Meter to his SMT Account or may register for an SMT Account using the Smart Meter in question.

### 10.3 Customer Experience Accounts

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SMT Customer Experience Accounts are intended to allow a REP to see the same SMT screens that a customer sees. You will not be able to see the customer's actual data. If you want to see your customer's usage data, you will need to login to your REP account.

Each REP Company is issued three (3) demo Smart Meters to be used to establish the Customer Experience Accounts. These 3 demo Smart Meters should be used to register:

- An English-speaking Residential Account
- A Spanish-speaking Residential Account
- A Business Account

Contact the SMT Help Desk to request your demo Smart Meters.




NOTE: The request for the demo Smart Meters must come from one of your company's SMT Administrators. The response will be sent to the email address in the Company Profile.

For more information on these demo Smart Meters and how to establish your SMT Customer Experience accounts, please see Appendix B: SMT Customer Experience Accounts for REPs.



## 11 Additional Help

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Most SMT web pages have page help available. Look for the Help icon  near the top of the page. Clicking this icon will display page help for the current page.

Most SMT fields and labels contain tool tips. Roll your mouse over the field or label to see the tool tip. Figure 48 shows an example of a displayed tool tip.

**Personal Information**

\* First Name:

Middle Initial:

\* Last Name:

Suffix:

**You must provide your first name.**

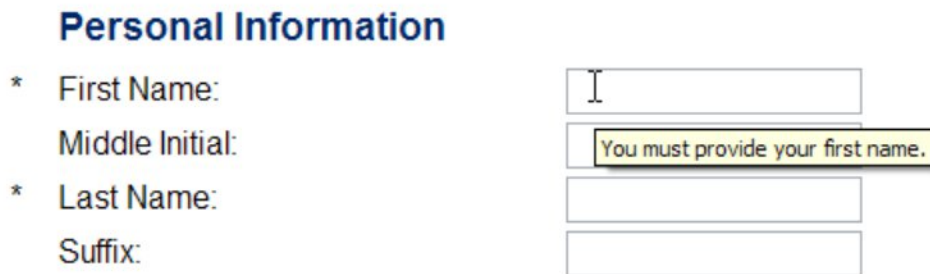


Figure 48: Tool Tip Display

Frequently asked questions and other helpful information can be found by selecting the Help tab.

If you need additional Help with the SMT website, contact the SMT Team at 888-616-5859.

## Appendix A: Working with CSV Files

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CSV, or Comma Separated Values, represents a specific text file format in which the fields in a record are separated by a comma. All Import and Export functions in SMT require the use of CSV formatted files.

### A.1 Creating a CSV File for Import

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Two of the most common tools for creating CSV files are Windows Notepad and MS-Excel.

Before creating your CSV file, you will need to know which fields to enter. If you will be using your Import file to add Smart Meters to your Account, you will need both ESI ID and Meter Number for each Smart Meter that you wish to add. If you will be using your Import file to create reports for your Smart Meters, then you will need either the ESI IDs or the Meter Numbers to be selected, but not both.

#### A.1.1 Creating a CSV File using Windows Notepad

---

Open Windows Notepad on your computer.



NOTE: On most computers, Windows Notepad can be found by pressing the Start button, selecting 'All Programs', and then selecting 'Accessories'.

Type directly into the open text area. Use a comma to separate fields. Use the Enter key to separate rows. Each Smart Meter in your CSV file should be in a separate row. Do not include any headers, text, or other information in the file.

Figure 49, Figure 50, and Figure 51 show examples of CSV files created in Windows Notepad.

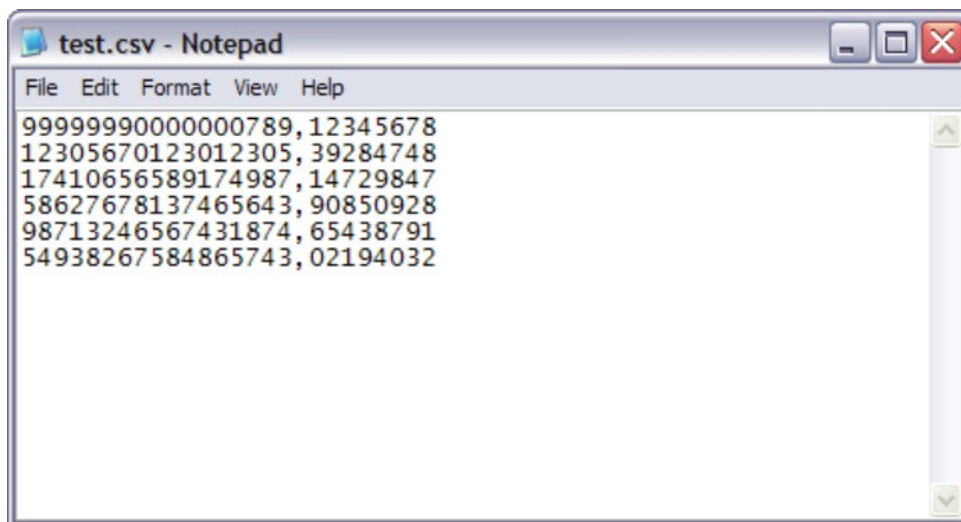


Figure 49: Sample Notepad CSV – Import for Adding Meters

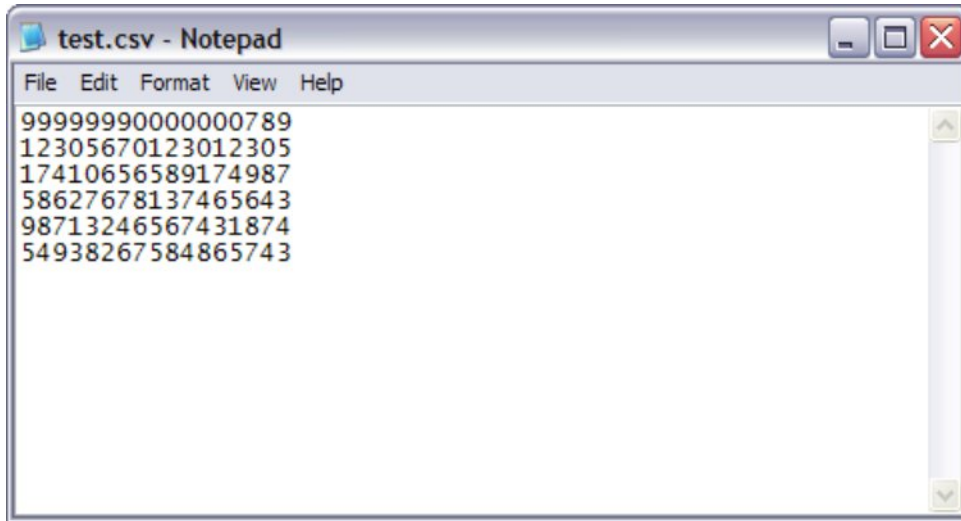


Figure 50: Sample Notepad CSV – Import for Reporting by ESI ID

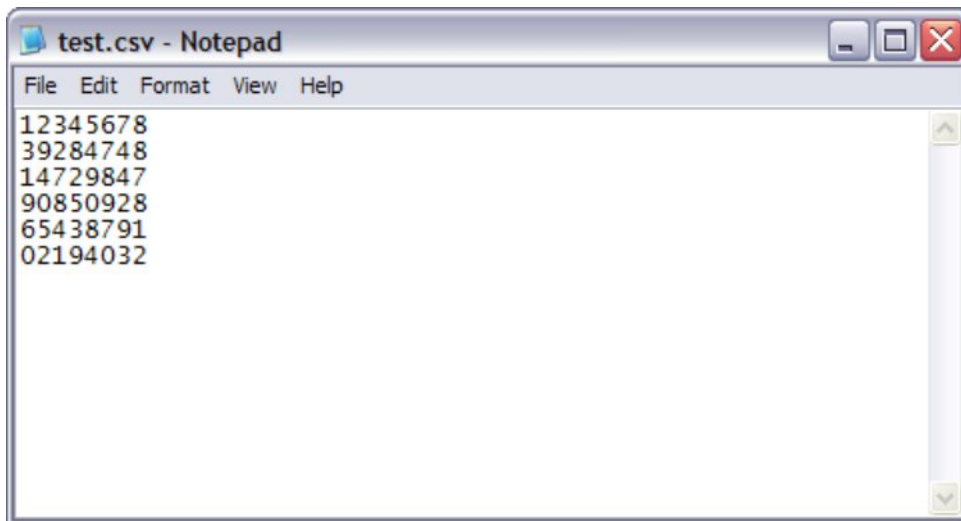


Figure 51: Sample Notepad CSV – Import for Reporting by Meter Number

Save your file and exit Windows Notepad when you finish entering your data.



NOTE: Windows Notepad will automatically save your file with a file extension of TXT. SMT requires Import files to have a file extension of CSV. You must rename your file after saving with Windows Notepad so that it ends in CSV.

Test.txt must be renamed to Test.csv

### A.1.2 Creating a CSV File using MS-Excel

Open MS-Excel on your computer.

Each Smart Meter in your file should be in a separate row. Each field should be in a separate column. Do not include any headers, text, or other information in the file.



NOTE: Excel has a limitation of 15-digits for cells formatted as Number. Excel will use exponential notation for numbers greater than 12-digits for cells formatted as General. Because ESI IDs contain 17-digits, any Excel cell where you will type an ESI ID must first be formatted as 'Text'.

Figure 52, Figure 53, and Figure 54 show examples of MS-Excel files.

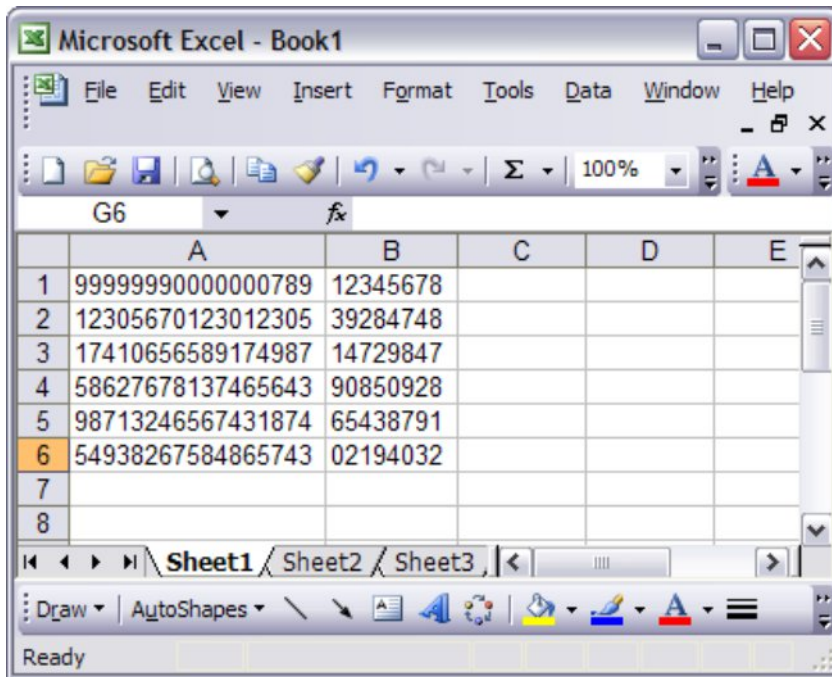


Figure 52: Sample Excel CSV – Import for Adding Meters

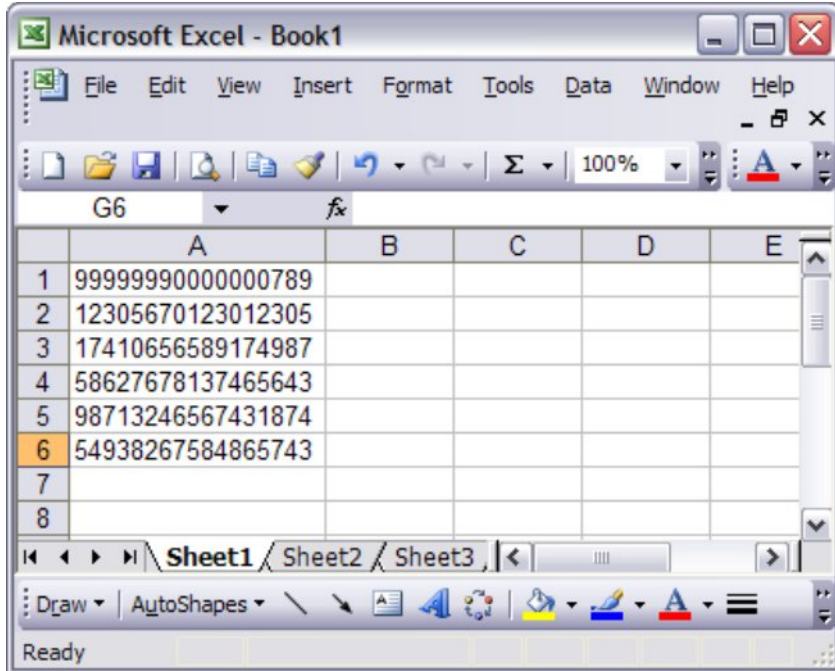


Figure 53: Sample Excel CSV – Import for Reporting by ESI ID

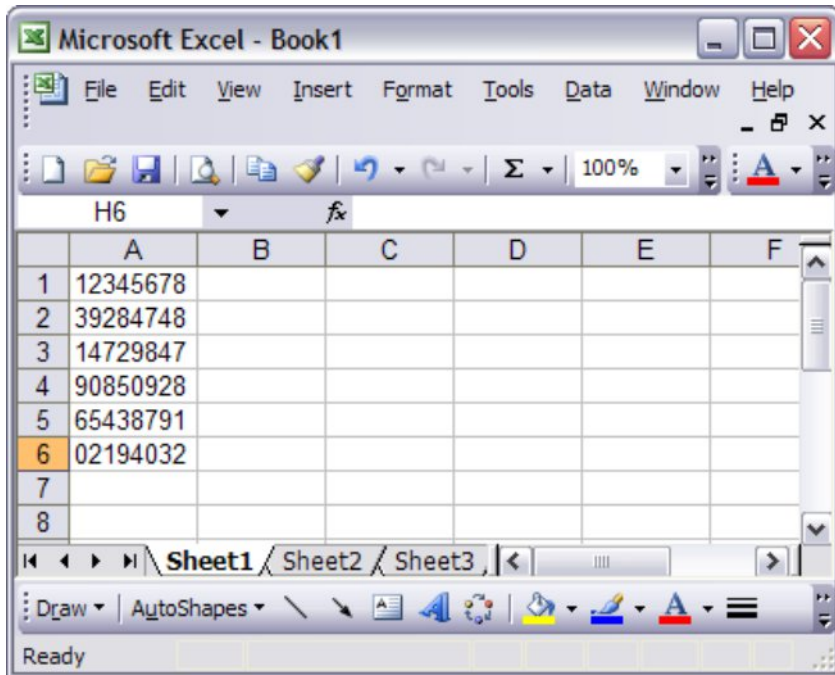


Figure 54: Sample Excel CSV – Import for Reporting by Meter Number

When you are finished entering your data, save your file as a CSV file by selecting the CSV in the 'Save as type' field as show in Figure 55.

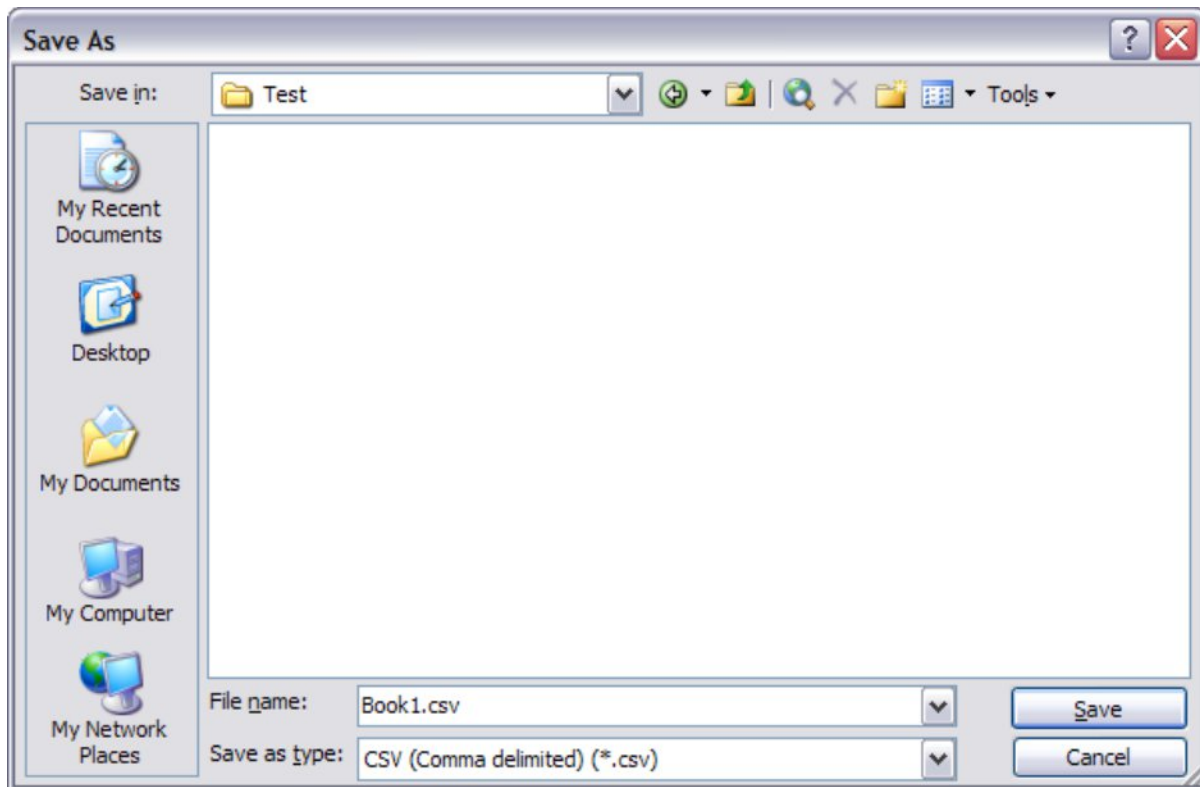


Figure 55: Excel Save as type CSV



**NOTE:** When Excel saves to the CSV file type, it does not save the cell format. If you re-open the file that you just created, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly. For more information, see Appendix A.2 Opening a CSV File.

## A.2 Opening a CSV File

Reports and files that are exported or downloaded from SMT are in CSV format. Since CSV files are specially formatted text files, they can be opened by any text-based application, like Windows Notepad. CSV files can also be opened by MS-Excel. However, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly if you simply open the CSV file using Excel.

To properly display all fields, you must use the Excel 'Import External Data' feature which can be found under Data on your Excel toolbar, as show in Figure 56.

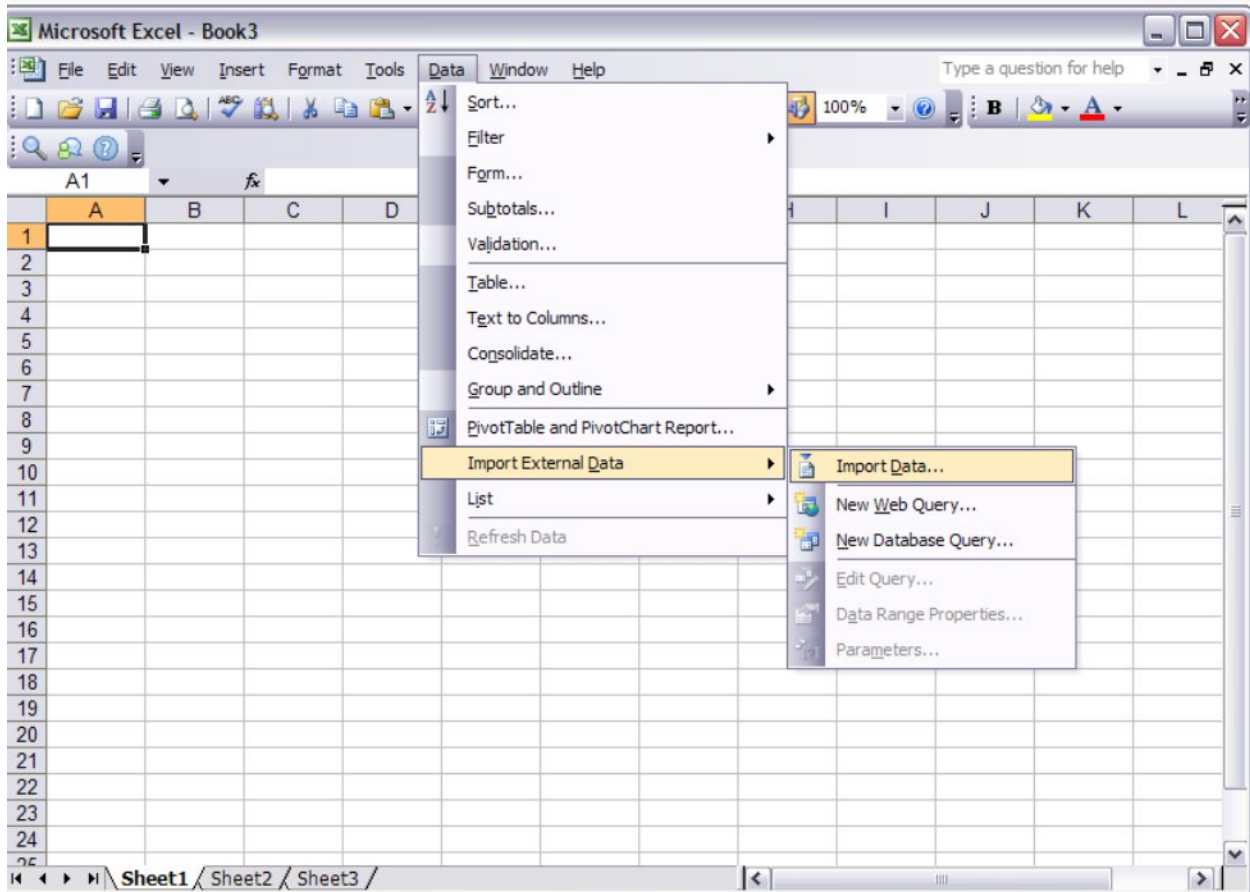


Figure 56: Excel Import External Data

Select the CSV file to be opened as your Source Data file. This action will initiate the Excel Text Import Wizard. In Step 1 of 3 of the Text Import Wizard, verify that 'Delimited' is selected, as shown in Figure 57, and Click Next.



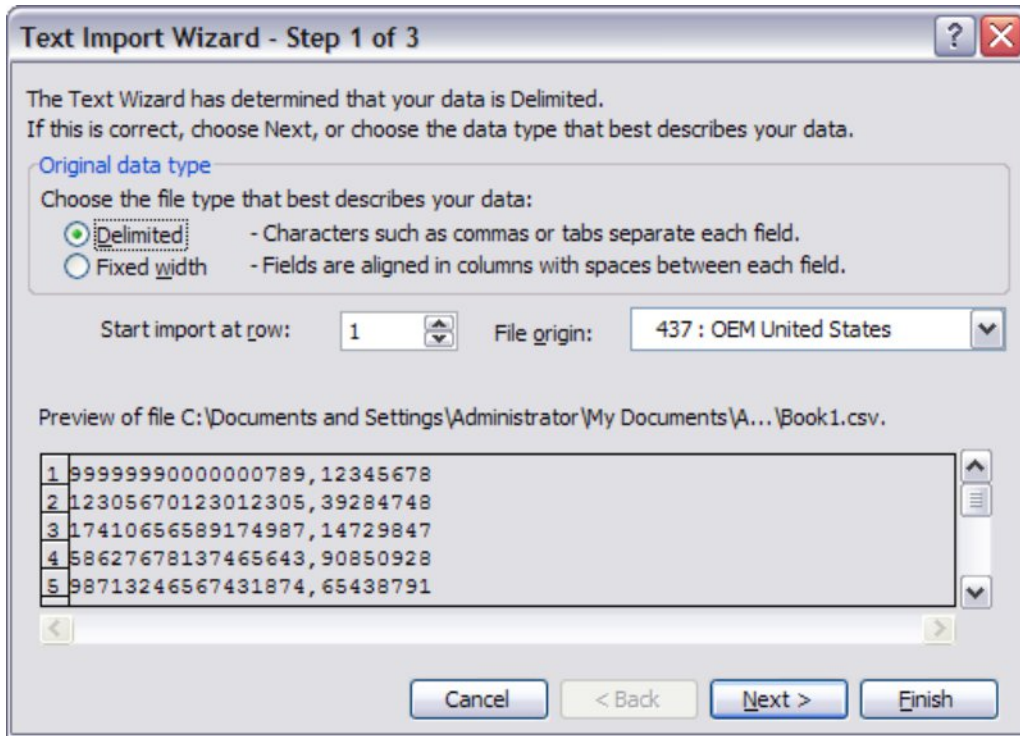


Figure 57: Excel Text Import Wizard – Step 1 of 3

In Step 2 of 3 of the Text Import Wizard, verify that 'Comma' is selected, as shown in Figure 58, and Click Next.

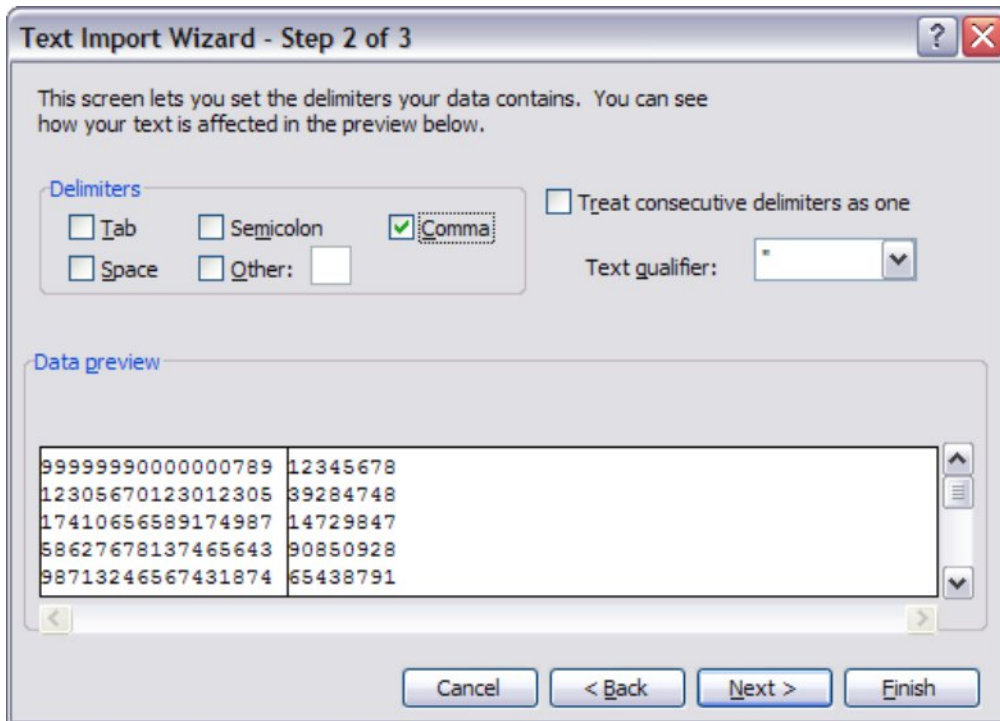


Figure 58: Excel Text Import Wizard – Step 2 of 3



In Step 3 of 3 of the Text Import Wizard, select the column header of any column containing ESI IDs, change the column data format to 'Text', as shown in Figure 59 Customer Meter List – My Account, and Click Finish.

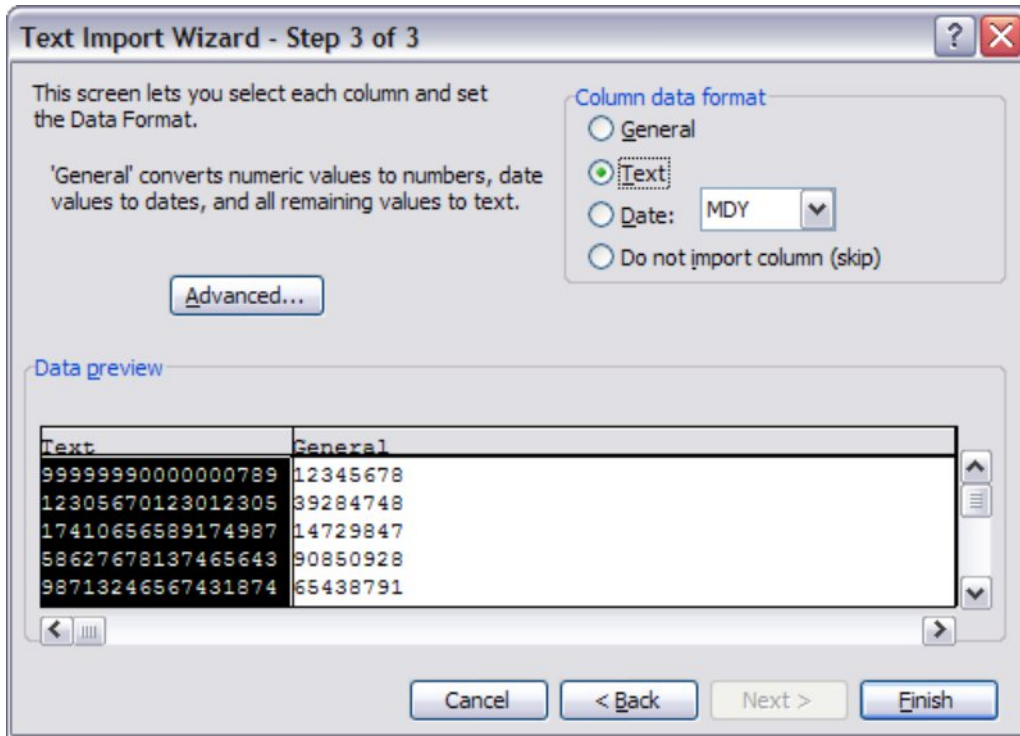


Figure 59: Excel Text Import Wizard – Step 3 of 3

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## Appendix B: SMT Customer Experience Accounts for REPs

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SMT Customer Experience Accounts are intended to allow a REP to see the same SMT screens that a customer sees. You will not be able to see the customer's actual data. If you want to see your customer's usage data, you will need to login to your REP account.

Each REP Company is issued three (3) demo Smart Meters to be used to establish the Customer Experience Accounts. These 3 demo Smart Meters should be used to register:

- An English-speaking Residential Account
- A Spanish-speaking Residential Account
- A Business Account

Contact the SMT Help Desk to request your demo Smart Meters.



NOTE: The request for the demo Smart Meters must come from one of your company's SMT Administrators. The response will be sent to the email address in the Company Profile.

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### B.1 Register your SMT Customer Experience Accounts

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To register your accounts, go to [www.smartmetertexas.com](http://www.smartmetertexas.com) and click the 'New User Register' button. You may use any information you like for the registration but keep in mind that the temporary password for the account will be sent to the email address that you enter. So be sure to enter an email address that you can access.

You should use one of your assigned Smart Meters to register as an English-speaking Residential Customer. Use one to register as a Spanish-speaking Residential Customer. Use the other to register as a Business (non-Residential) customer.

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### B.2 Sharing your Customer Experience Accounts

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Multiple people can login to the same account at the same time. You can distribute your 3 Customer Experience accounts to multiple people.

You can login to both your REP account and a Customer Experience account at the same time as long as you are using two completely independent browsers (e.g., Internet Explorer and Firefox). If you attempt to login to both accounts using the same browser software, you will experience unpredictable results (e.g., you may see screens for one account showing in the other account's window).

If you do not have independent browsers, then you will need to logout of your REP account before logging in to your Customer Experience account and vice versa.

### B.3 Removing a Meter from a Customer Experience Account

---

You can free up one of your demo Smart Meters to be used again for another Customer Experience Account. To detach the demo Smart Meter from an existing account, refer to the SMT Customer User Guide for information on removing a meter from your Customer account. Or, you can contact the SMT Help Desk and ask that the meter be removed from the existing account. You will then be able to register a new account using the same ESI ID and Meter Number.



NOTE: This process is only for your Customer Experience accounts. If you need to have a meter removed from one of your actual Customer's accounts, see Section 10.2 Removing a Smart Meter from a Customer Account.

### B.4 Usage Data for Customer Experience Accounts

---

The assigned Smart Meters for your Customer Experience Accounts are not real meters and the usage data is not intended to be an accurate representation of a specific customer. The usage data is 'test data' that is loaded into SMT on a monthly basis. The data for each meter is identical. Data is loaded into SMT for these meters on or near the 1<sup>st</sup> of the month for the month prior. For example, on or near June 1, the interval and other usage data is loaded for the month on May. On or near July 1, data will be loaded for the month of June.

## Appendix C: Glossary

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The following terms and acronyms are commonly used by SMT or in the Texas competitive electric market.

Term	Definition
AMS	Advanced Metering Solutions
API	Application Program Interface
Authenticated user	Users who have already logged in with their UserID and password.
CSV	Comma Separated Values – a common file format in which the data is presented as a list of fields that are separated by commas. CSV files are typically opened with an application or spreadsheet software, such as MS-Excel.
Company Administrator	An employee or representative of a Company that is assigned the role and responsibility to manage (grant and revoke) permissions of Accounts having SMT access to the Smart Meters associated with the Company.
ERCOT	Electric Reliability Council of Texas that operates the electric grid and manages the deregulated market for 75 percent of the state of Texas.
ESI ID	Electric Service Identifier, a unique identifier for the point of electric delivery to a consumer.
FAQ	Frequently asked questions
HAN	Home Area Network – this is the network between the advanced meter and the home device as mentioned in the AMS rules
LSE	Standard file format used in the Texas competitive electric market for interval data files.
PUCT	Public Utility Commission of Texas
REP	Retail Electric Provider
ROR	REP of Record
SMT	Smart Meter Texas
TDSP	Transmission and Distribution Service Provider, also known as the TDSP
Unauthenticated user	Users who have not yet logged in with their UserID and password.
ZigBee	Communication protocol used with HAN devices