Registered Entity Requesting Access and Pre-Launch Provisioning
All Align users MUST have an ERO Portal Account

- **Set up ERO Portal Account:**
  - Navigate to [https://eroportal.nerc.net](https://eroportal.nerc.net).
  - Select “Register” in the upper left-hand corner.
  - Complete the registration form and click “Submit.”

- **Verify ERO Portal Account:**
  - Navigate to [https://eroportal.nerc.net](https://eroportal.nerc.net).
  - Select “Sign In” in the upper left-hand corner.
  - Enter your credentials to confirm access to ERO Portal.

Prior to go-live, NERC will ensure all PCCs with ERO Portal Accounts are set up as an **Align Registered Entity Submitter** and the **Entity Administrators** responsible for approving access requests.
Setting up an ERO Portal Account
Start a New Registration

If you do not already have an ERO Portal account, you must first register for a new account. The ERO Portal can be found here: https://eroportal.nerc.net.

The following information walks through the process of a new user setting up an account.

1. Click on the REGISTER button in the upper right hand corner.
2. Fill out the form below. Please use your email and contact information that is associated with the Registered Entity you represent.
3. Once you click **Submit** the system will provide a confirmation message similar to the one below with instructions on how to continue this process.

![Confirmation Message](https://example.com/confirmation_message.png)
Setting up an ERO Portal Account
Confirm Email Address

4. Login to your email inbox (the email address you entered above) to find the instructions on how to continue an example is shown below, click the Confirm Your Email link from the email to complete the registration process.

5. The system will inform you that your email has been confirmed, click Continue to complete your registration.
6. The login page below will load, you will need to enter the username and password you used on the registration page then click the **Sign in** button to continue.
7. The Multi-Factor explanation page below will load, you will need to click the **Start setup** button to continue.
8. The Add Device page below will load, you will need to select the radio button next to the type of device you are adding then click the **Continue** button to continue.

9. The Enter Your Phone Number page below will load, you will need to enter a valid phone number, verify the number is correct by clicking the checkbox and then click the **Continue** button to continue.
10. Select the type of mobile device you are using by selecting the radio button next to your device type and select **Continue**.
11. Follow the instructions to download the Duo app if you don’t already have it installed.
12. Once you have downloaded and installed the Duo Mobile app to your mobile device, or if the Duo app is already installed on your device select the “I have Duo Mobile” button. The Activate Duo Mobile screen will appear with a QR code displayed.

13. Follow the steps below to activate your mobile device for Multi-Factor Authentication (MFA) for the ERO Portal. You will only have to do this once.
   - Open the app and tap the “+” button in the app to add a new ERO Portal account to Duo Mobile.
   - If you are prompted to allow Duo Mobile to send your notifications, select OK or Allow.
   - If you are prompted to allow Duo Mobile access to your camera, select Ok or Allow.
   - Point the camera so that the QR code presented on your monitor is visible on your mobile device’s screen.
   - Once the Duo Mobile app reads the QR Code, a large green check mark will appear over the QR code. Select Continue.
14. Your Multi-Factor Authentication device is now setup, the MFA Home Screen will load. Select the check box next to Remember Me for 1 Day and select the method you would like to use to complete authentication into the ERO Portal.

- Selecting Call Me will place a phone call to your mobile device. Follow the voice prompts to complete the authentication process. You will be taken the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.
- Selecting Send Me a Push will activate the following prompt via the Duo Mobile app on your mobile device. Select Approve to complete the authentication process. You will be taken the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.
15. Once you have returned to the ERO Portal profile page, you may populate the fields required to complete your ERO Portal profile.
16. The Work Address page below will load, you will need to provide data for any field marked with a red asterisk then click Next to continue or Previous to return to the previous page.
17. The company page below will load, you have the option to identify the company you are affiliated with; however, this information is not required. Click Next to continue or Previous to return to the previous page.
18. The final step in the Registration Process is to provide Security Questions and Answers. This information is used if you ever forget your password or username and need to reset your login information. The Security page below will load, you must provide 2 questions and answers for those questions in order to complete the process.

19. Once you click **Save** the system will let you know the process is complete (your ERO Portal registration is completed), see below.
Existing User Login
The following information walks through the process of an existing user logging into the ERO Portal.

1. Click on the **My Account** button in the upper right hand corner

![My Account Button](image)

2. The Sign in or recover your username or password page shown below will load, click **Sign in** to continue.

![Sign In Page](image)
3. The Sign In with External Stakeholders or NERC Staff page shown below will load, select External Stakeholders.
4. The ADFS Username and Password page shown below will load, enter your username and password then click Sign in to continue.

![Sign in page](image)
5. The MFA Home Screen will load. Select the method you would like to use to complete authentication into the ERO Portal.

- Selecting Call Me will place a phone call to your mobile device. Follow the voice prompts to complete the authentication process. You will be taken the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.

- Selecting Send Me a Push will activate the following prompt via the Duo Mobile app on your mobile device. Select Approve to complete the authentication process. You will be taken the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.
6. You are now successfully logged into the ERO portal and this landing page will appear below.
Requesting Align Access
Application Access Requests

Below is the list of submitted application requests. To request access to an ERO Portal application, please use the link below to submit your access request information. Your request will be submitted to the corresponding entity administrator for approval.
<table>
<thead>
<tr>
<th>Application</th>
<th>Role</th>
<th>Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All</strong></td>
<td>Entity Administrator</td>
<td>This person has read and write access to Align data, GMD data, MIDAS data, and CORES data. In addition, this person can make others the Entity Administrator and give others access to Align, GMD, MIDAS and CORES or remove access to those system from others.</td>
</tr>
<tr>
<td>ALIGN</td>
<td>Align Registered Entity Editor</td>
<td>This person can create and edit a self-log in Align for the Entity he/she is associated with.</td>
</tr>
<tr>
<td>ALIGN</td>
<td>Align Registered Entity Reader</td>
<td>This person can read a self-log in Align for the Entity he/she is associated with.</td>
</tr>
<tr>
<td>ALIGN</td>
<td>Align Registered Entity Submitter</td>
<td>This person can create/edit and submit a self-log in Align for the Entity he/she is associated with.</td>
</tr>
<tr>
<td>CORES</td>
<td>CORES User</td>
<td>This person can create/edit registration information (including CFRs/JROs) and run registration reports for the entity he/she is associated with.</td>
</tr>
<tr>
<td>GMD</td>
<td>GMD User</td>
<td>This person can view and submit GMD data and run GMD reports for the entity he/she is associated with.</td>
</tr>
<tr>
<td>GMD</td>
<td>GMD Read-Only</td>
<td>This person can view GMD data and run GMD reports for the entity he/she is associated with.</td>
</tr>
<tr>
<td>MIDAS Portal</td>
<td>MIDAS User</td>
<td>This person can create/edit and submit MIDAS data and run MIDAS reports for the entity he/she is associated with.</td>
</tr>
<tr>
<td>MIDAS Portal</td>
<td>MIDAS Read-Only</td>
<td>This person can view MIDAS data and run MIDAS reports for the entity he/she is associated with.</td>
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</table>

**Entity**

**Requested Application Role**

**Requester Comments**
• **Account Access Levels**

  - **Align Registered Entity Reader**
    - Can log into Align and see everything for their Registered Entity, but cannot make changes.

  - **Align Registered Entity Editor**
    - Can log into Align, see everything for their Registered Entity, and make changes, but cannot submit anything to the CEA for review or processing.

  - **Align Registered Entity Submitter**
    - Can log into Align, see everything for their Registered Entity, make changes, and submit things to the CEA for review or processing.
• all entities registered with NERC for compliance purposes and non-registered entities that have a reporting obligation (MIDAS/GADS/TADS)
• can only select 1 entity
• list of available roles are shown on the previous slide with a description
• can only select 1 role
Enter Comments and Submit Request

• comments are optional
• click submit button to complete request
  ▪ system generates an email to alert you this request has been submitted for review
Review and Approve Align Access Request
Entity Admin Navigates to Access Request

- Option 1:

- Option 2:

Welcome to the ERO Portal

The ERO Portal allows new users to register for an account and perform the following functions upon completion:
Entity Admin Manages Access Request

• Landing Page – shows open request:

Application Access Requests

The following are the current application access requests for your registered entity. To approve or reject a request, select “Manage Access Request” from the item menu. When rejecting an access request, you must provide a reason for denying a request.

You can also view and manage all users for your entity on the Manage Entity Page.

<table>
<thead>
<tr>
<th>Requested By</th>
<th>Email Address</th>
<th>Phone</th>
<th>Requested Application Role</th>
<th>Requester Comments</th>
<th>Request Status</th>
<th>Created On</th>
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<tr>
<td>victor LT myersssssssss</td>
<td><a href="mailto:victormyers1906@gmail.com">victormyers1906@gmail.com</a></td>
<td>404-555-1212</td>
<td>CFR Administrator</td>
<td>kjj</td>
<td>Pending</td>
<td>6/24/2020 5:42 PM</td>
</tr>
<tr>
<td>Kwame Jones</td>
<td><a href="mailto:kwame.jones@nerc.net">kwame.jones@nerc.net</a></td>
<td>4044462570</td>
<td>Entity Admin</td>
<td>Testing Entity Admin Request</td>
<td>Pending</td>
<td>5/27/2020 1:04 PM</td>
</tr>
<tr>
<td>Rachel Rieder</td>
<td><a href="mailto:rachel.rieder@nerc.net">rachel.rieder@nerc.net</a></td>
<td>404-852-3981</td>
<td>GMD Submitter</td>
<td>CAN I HAVE ACCESS PLEASE</td>
<td>Pending</td>
<td>4/29/2020 12:42 PM</td>
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• Option to Approve/Reject:

Application Access Requests

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✔ Approve Request
× Reject Request
Align Training Environment Access

- Training Environment Access
  - Align Training URLs:
    - [https://nerc-trn.bwise.net/bwise](https://nerc-trn.bwise.net/bwise) this url will take you through SSO and you will login with your Windows credentials.
    - [https://nerc-trn.bwise.net/bwise/login](https://nerc-trn.bwise.net/bwise/login) this will take you to the Align login where you can use the TestI D’s that were created by Functional Administrator.
  - **Example Test IDs:**
    - NCR99999 Editor 1
    - WECC Editor 2
    - ERO Editor 1
Questions and Answers