NERC
NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION

ERO Portal

End User Guide: Portal Users

June 28, 2019

RELIABILITY | ACCOUNTABILITY

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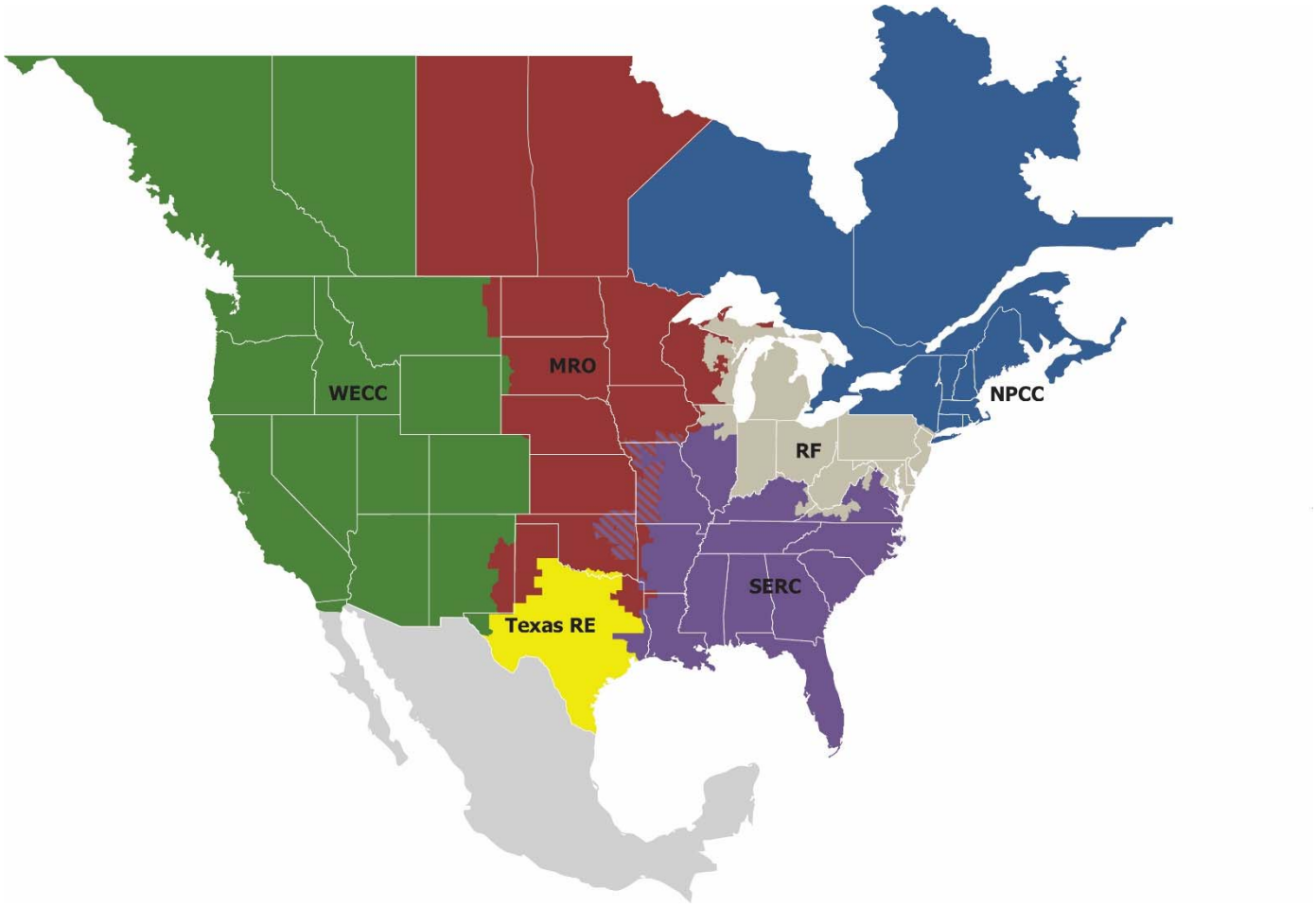
Preface

The vision for the Electric Reliability Organization (ERO) Enterprise, which is comprised of the North American Electric Reliability Corporation (NERC) and the six Regional Entities (REs), is a highly reliable and secure North American bulk power system (BPS). Our mission is to assure the effective and efficient reduction of risks to the reliability and security of the grid.

The North American BPS is divided into six RE boundaries as shown in the map and corresponding table below. The multicolored area denotes overlap as some load-serving entities participate in one Region while associated Transmission Owners/Operators participate in another.



MRO	Midwest Reliability Organization
NPCC	Northeast Power Coordinating Council
RF	ReliabilityFirst
SERC	SERC Reliability Corporation
Texas RE	Texas Reliability Entity
WECC	Western Electricity Coordinating Council

Introduction

ERO Portal

The ERO Portal is a tool that provides a user with the ability to perform the following, once the user has registered for an ERO Portal Account:

- Change his or her ERO Portal Account password
- Change the Security Questions for his or her ERO Portal Account
- Request access to NERC Data Stores, Extranet Sites and Web Applications
- See which NERC Data Stores, Extranet Sites and Web Applications the user has access to
- See which NERC Email Distribution Lists the user currently subscribes to

By default, registered entity Primary Compliance Contacts (PCC) are the system administrator for the ERO Portal, this responsibility can be delegated by the PCC at any time.

Resources

My Resources provides the current list of Data Stores and Extranet Sites the user is associated with and provides access to select NERC applications that users have been granted access to. Current applications that users can access through the portal include:

- Misoperation Information Data Analysis System (MIDAS)
- Coordinated Functional Registration (CFR) Tool
- Centralized Organization Registration ERO Systems (CORES)
- Align (scheduled implementation 2019)

Groups

My Groups provides a list of NERC email distribution lists the user subscribed to.

NERC Membership and NERC Membership List

NERC Membership provides the opportunity for companies to join 1 of 12 industry sectors. Please check the existing **NERC Membership List** to see if your company or Affiliate Company is already a member before submitting an application.

ERO Portal Actors

- Entities requesting registration in NERC Compliance Registry
- Registered Entity Administrators
- Regional Entities
- NERC

Chapter 1: Getting Started

Setup and Configuration

A web browser and an internet connection is needed to access the ERO Enterprise applications. The ERO Enterprise applications support the latest versions of Chrome, Internet Explorer 11, or later. Microsoft Excel, Microsoft Word, Microsoft Visio, or similar applications are required for opening and viewing documentation stored on these systems.

ERO Portal Registration

Access ERO Portal

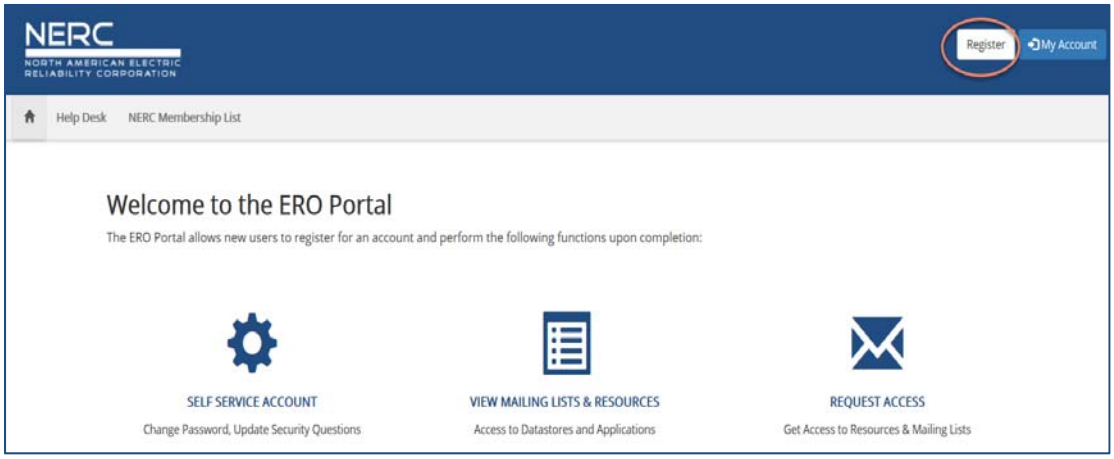
In order to access the ERO Portal users must first register for a portal account with NERC. Users will need to request access to the ERO Portal at https://eroportal.nerc.net. During registration the user will be prompted to set-up Multi-Factor Authentication.

Register for ERO Portal Account

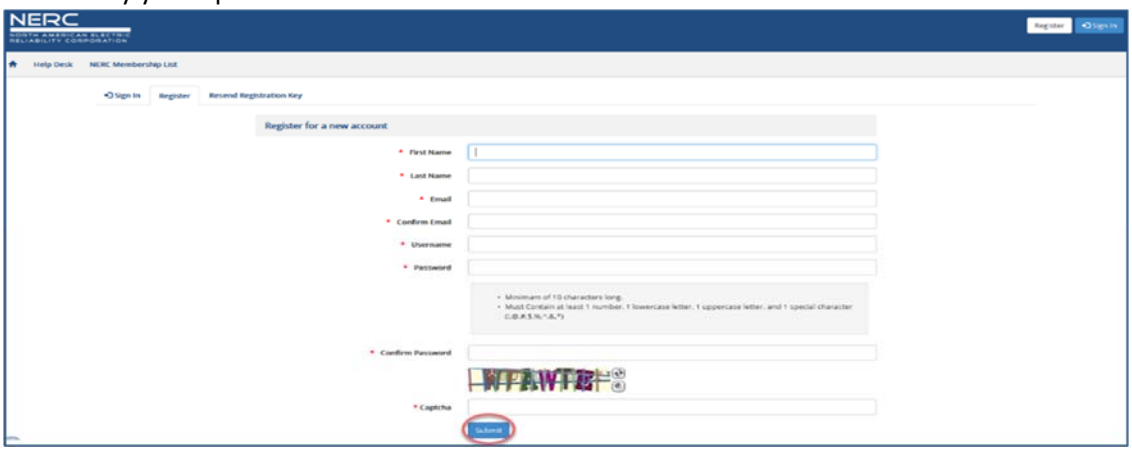
If you do not already have an ERO Portal account, you must first register for a new account. The ERO Portal can be found here: https://eroportal.nerc.net.

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

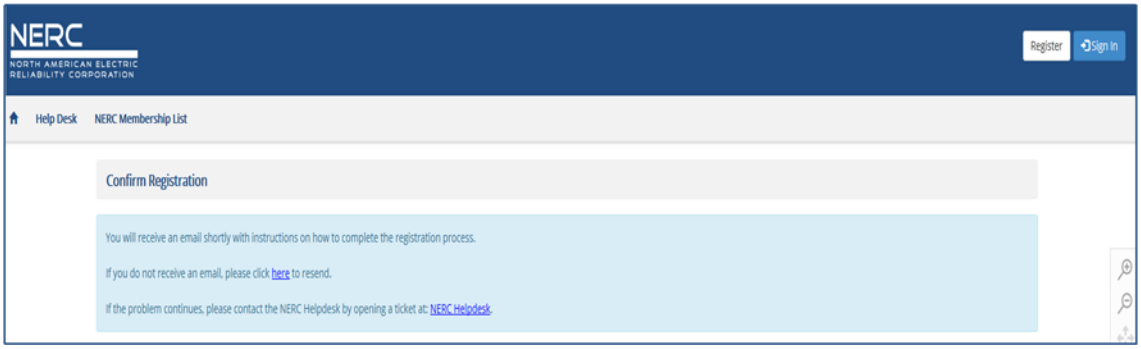
1. Select the **REGISTER** button in the upper right hand corner.



2. Fill out the form below. Please use your email and contact information that is associated with the registered entity you represent.

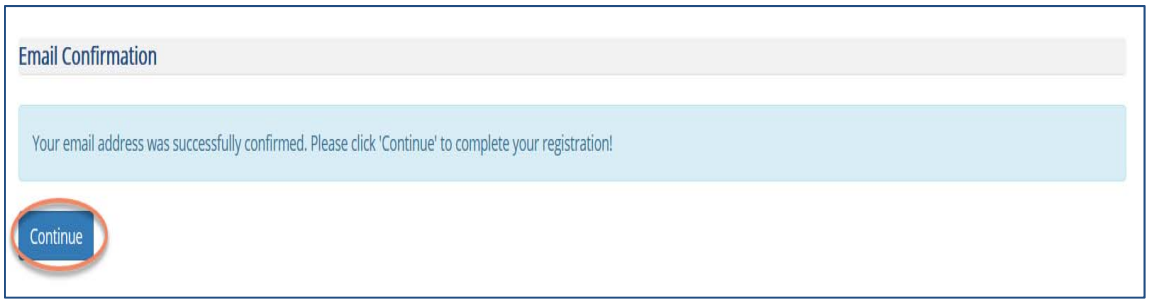


3. Once you click **Submit** the system, a confirmation message similar to the one below will be automatically sent from the system.

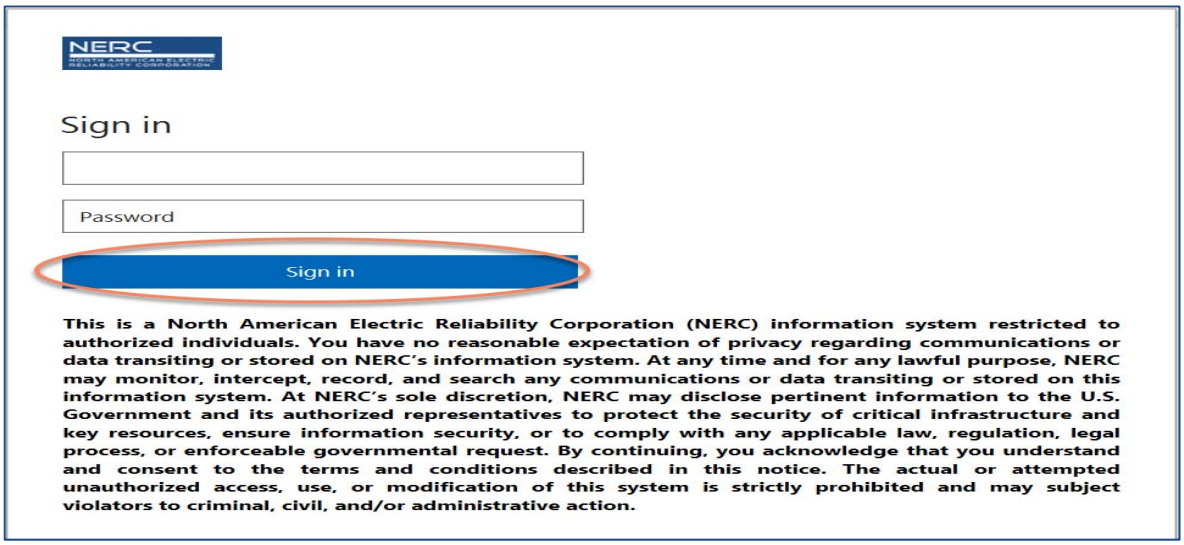


Login to your email inbox (the email address you entered above) to find the instructions on how to continue an example is shown below, click the **Confirm Your Email** link from the email to complete the registration process**.**

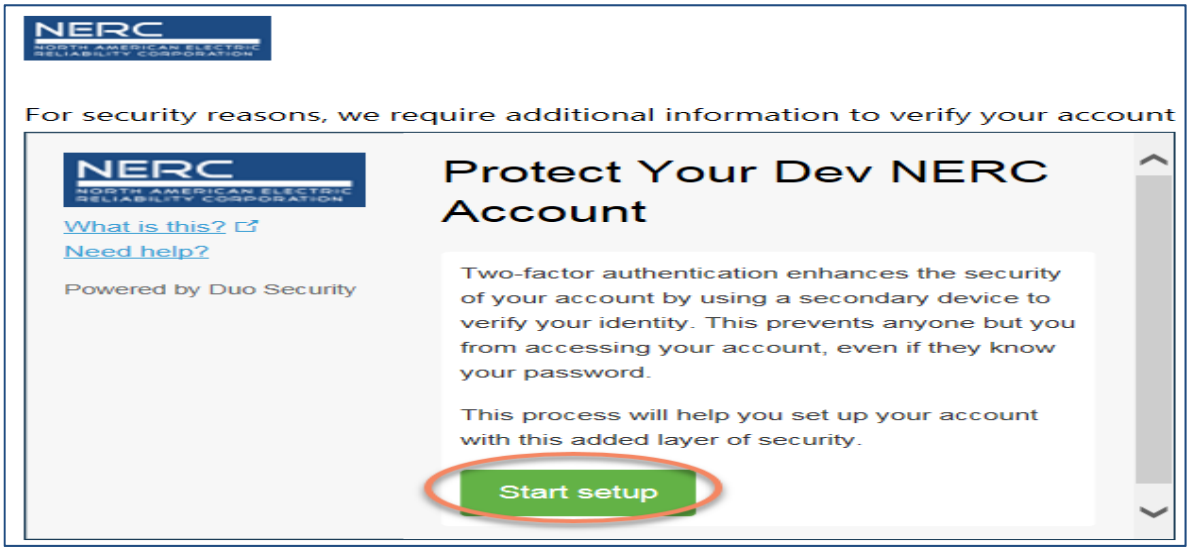
4. The system will inform you that your email has been confirmed, click **Continue** to complete your registration.



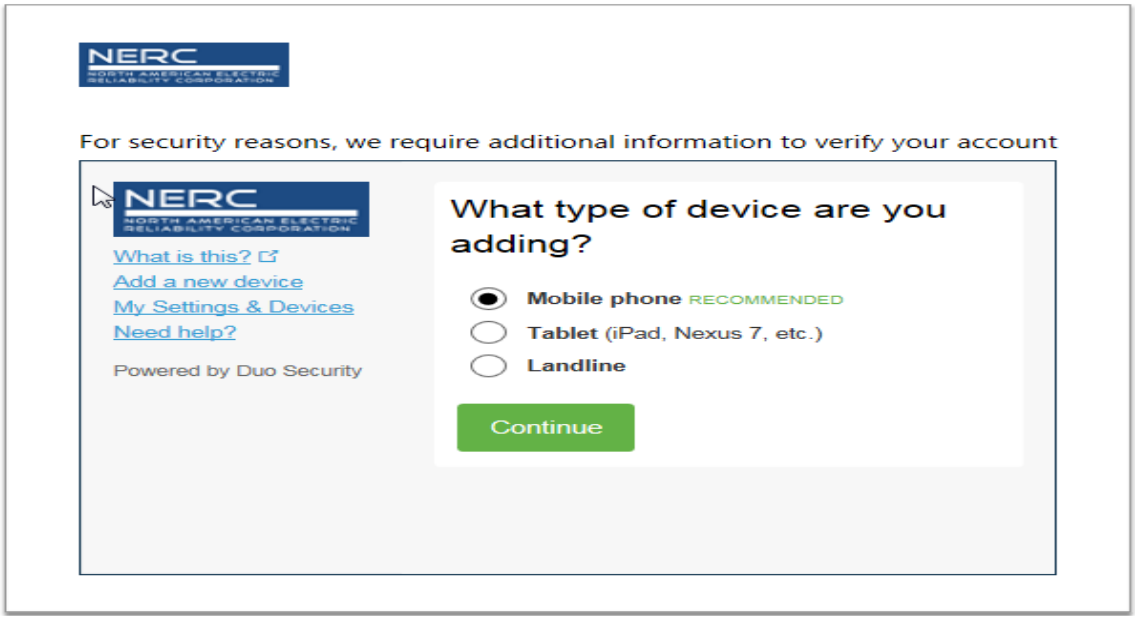
5. The login page below will load, you will need to enter the username and password you used on the registration page then click the **Sign in** button to continue**.**



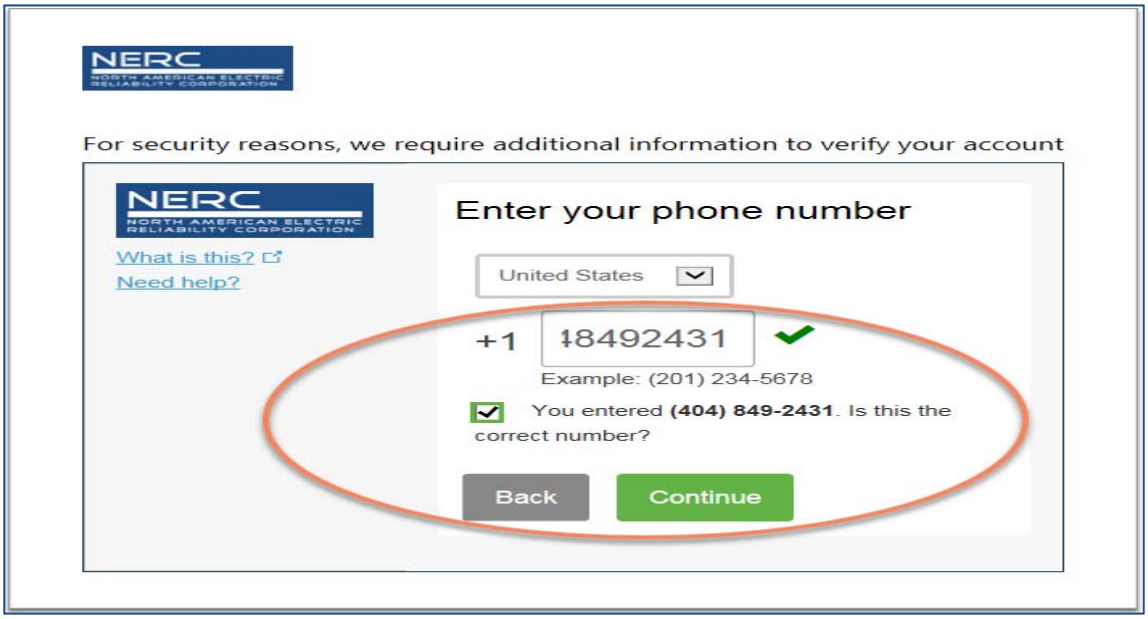
6. The Multi-Factor explanation page below will load, you will need to click the **Start setup** button to continue**.** **(**Existing ERO Portal users, see NERC's Multi - Factor Authentication - End User Guide for instructions.)



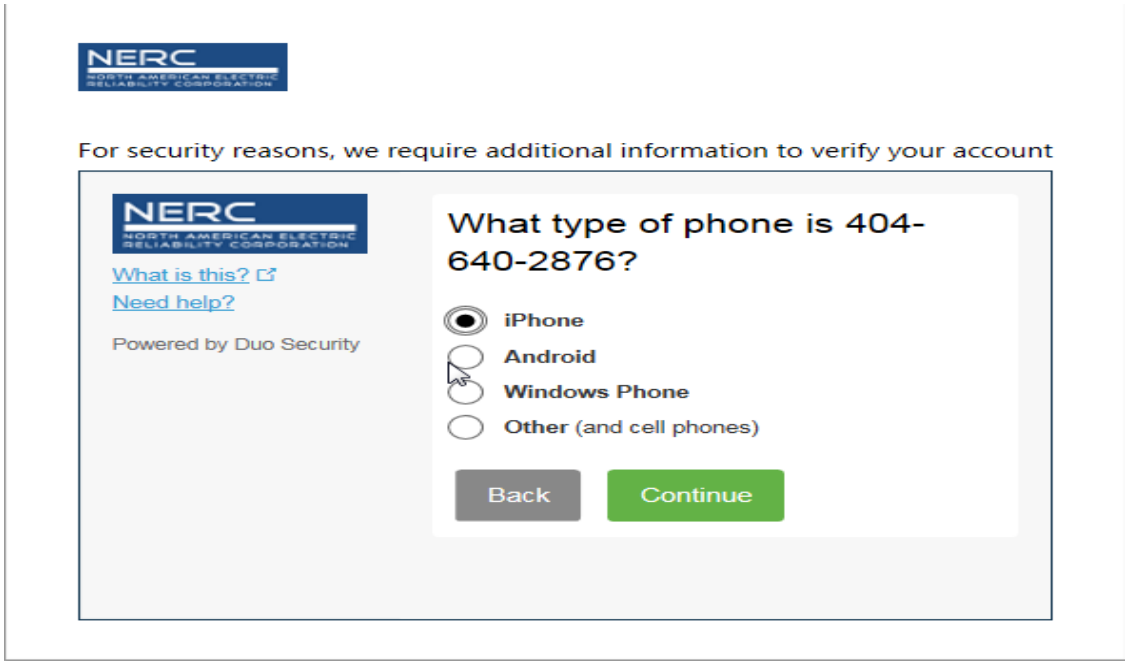
7. The Add Device page below will load, you will need to select the radio button next to the type of device you are adding then click the **Continue** button to continue**.**



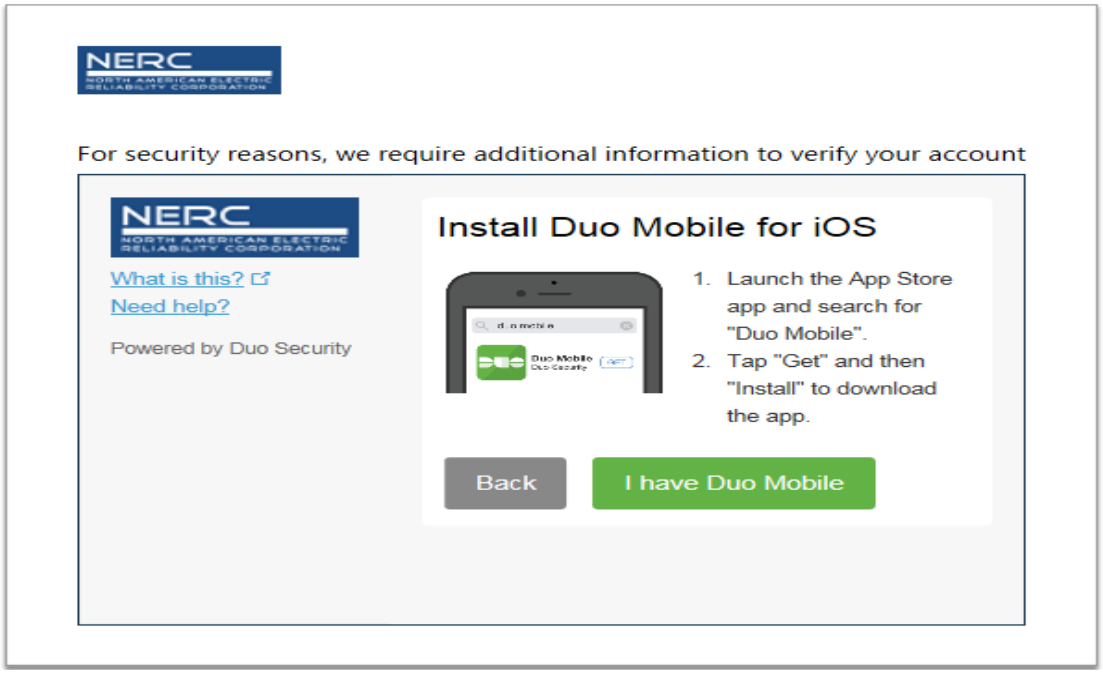
8. The Enter Your Phone Number page below will load, you will need to enter a valid phone number, verify the number is correct by clicking the checkbox and then click the **Continue** button to continue**.**



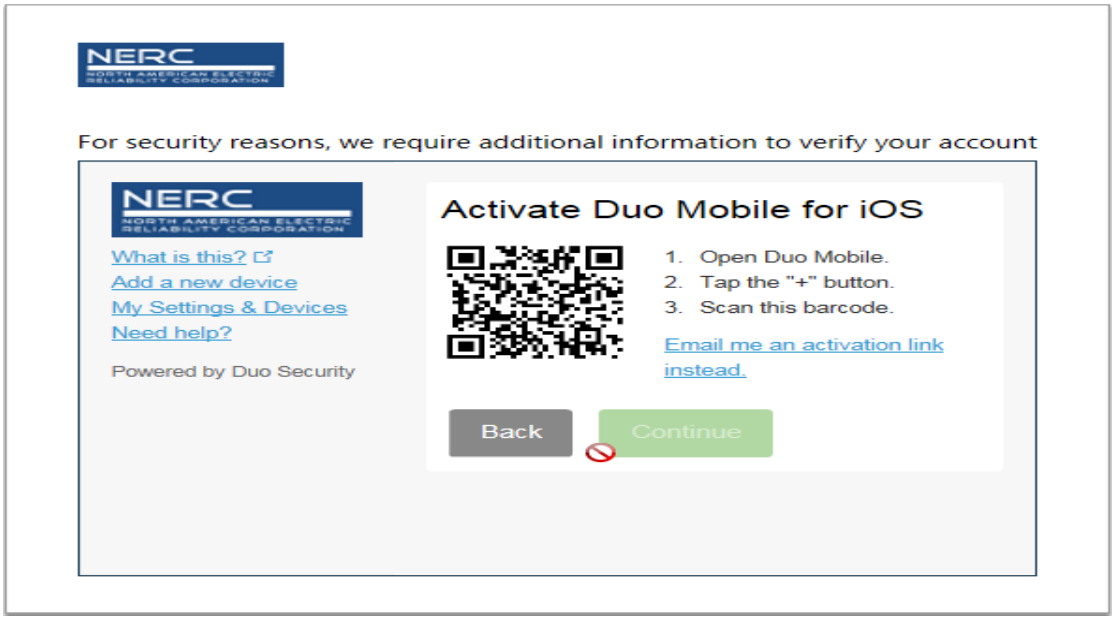
9. Select the type of mobile device you are using by selecting the radio button next to your device type and select **Continue.**



10. Follow the instructions to download the Duo app if you don't already have it installed.

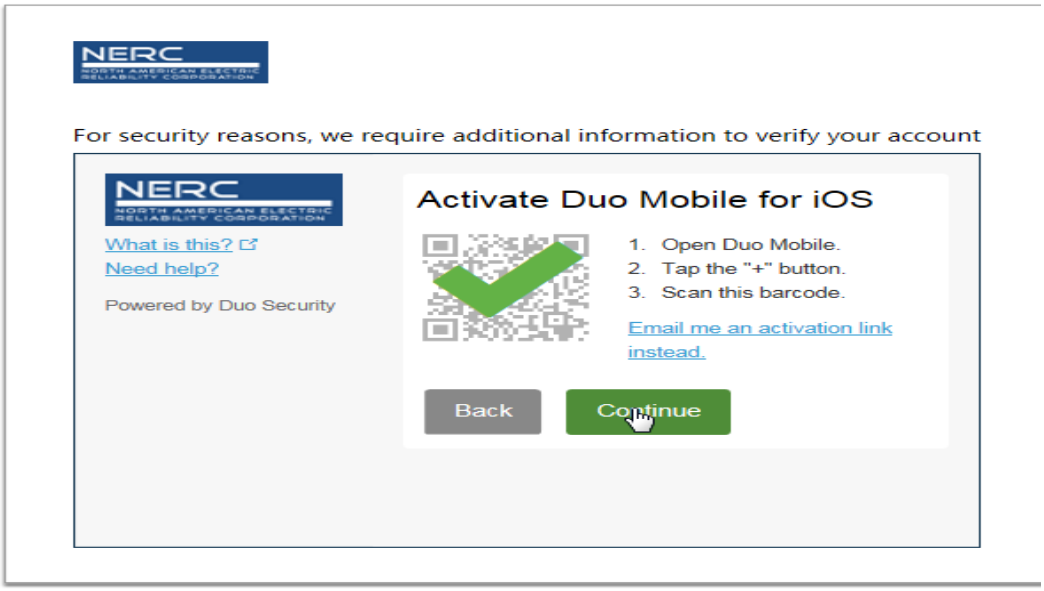


11. Once you have downloaded and installed the Duo Mobile app to your mobile device, or, if the Duo app is already installed on your device select the "**I have Duo Mobile"** button. The *Activate Duo Mobile* screen will appear with a QR code displayed.

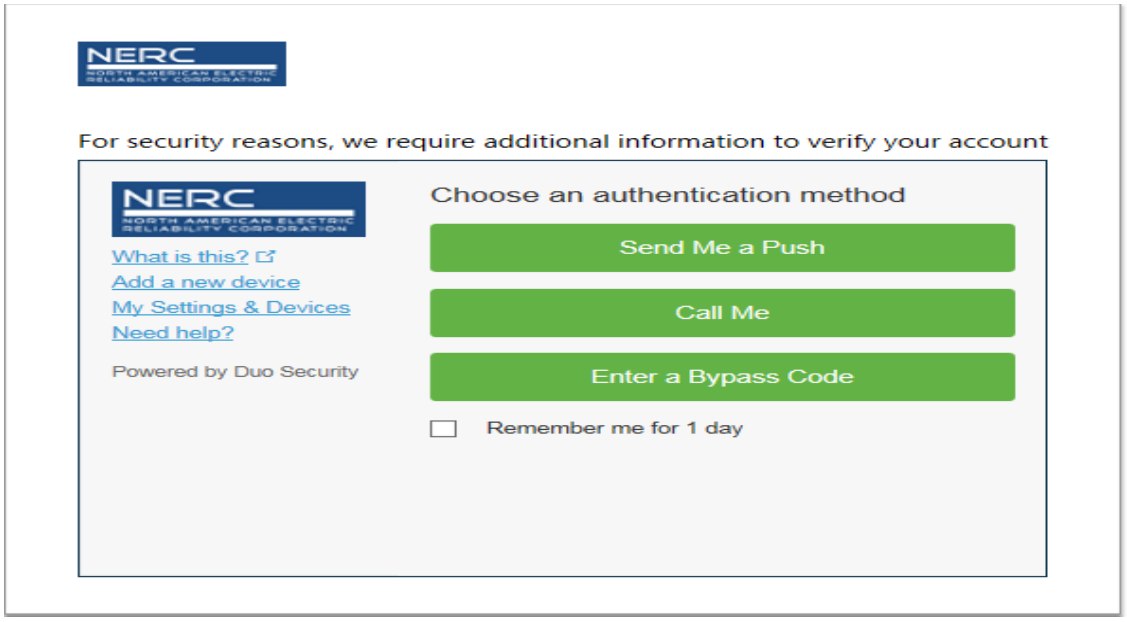


12. Follow the steps below to activate your mobile device for Multi-Factor Authentication (MFA) for the ERO Portal. You will only have to do this once.

- 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.**

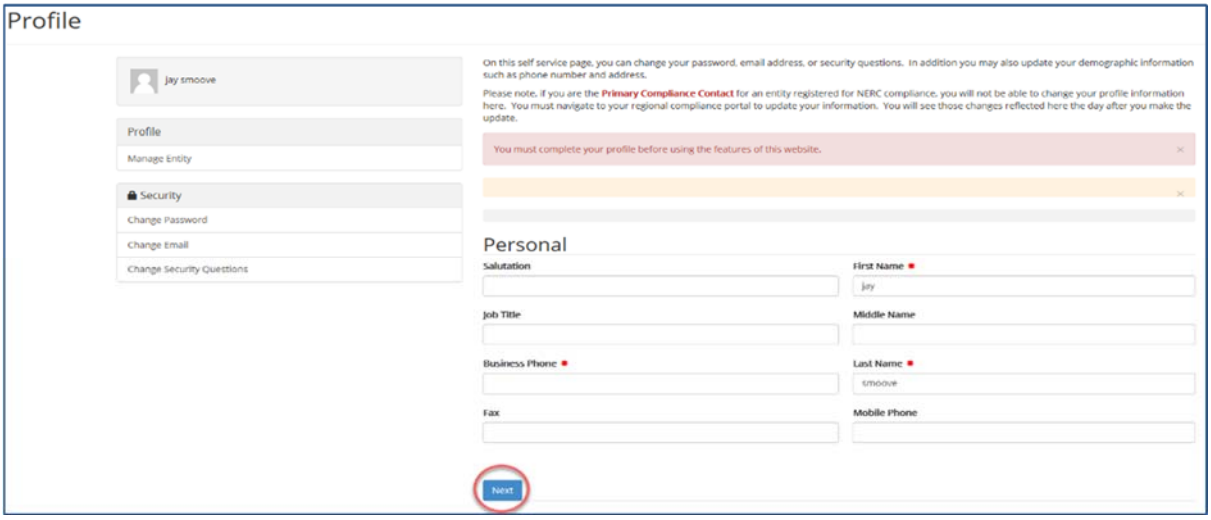


13. Your Multi-Factor Authentication device is now setup, the *MFA Home Screen* will load. Select the check box next to **Remember Me for 1 Day** and select the method you would like to use to complete authentication into the ERO Portal**.**

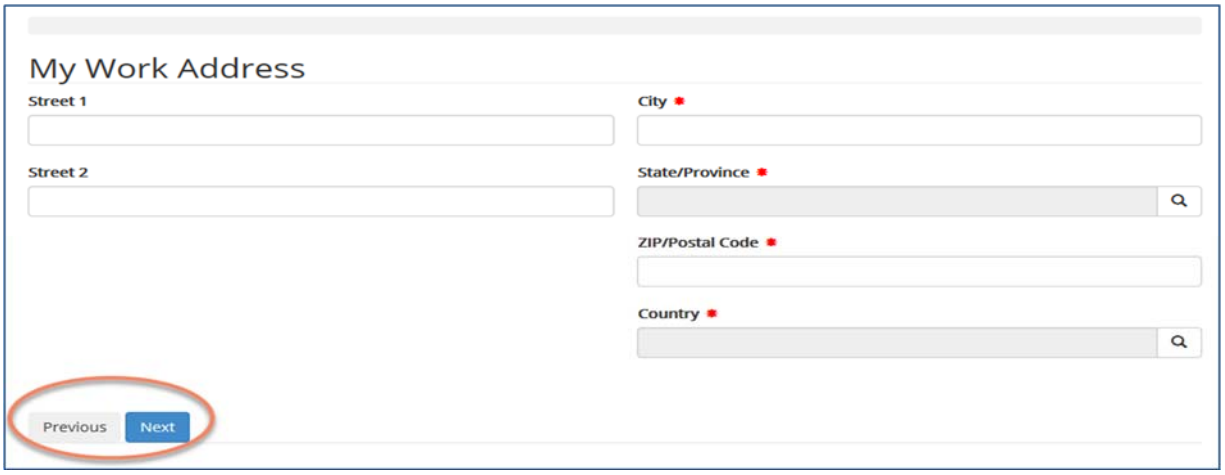


- Selecting **Call Me** will place a phone call to your mobile device. Follow the voice prompts to complete the authentication process. You will be taken to the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.
- Selecting **Send Me a Push** will activate the following prompt via the Duo Mobile app on your mobile device. Select **Approve** to complete the authentication process. You will be taken to the ERO Portal Profile where you can add the required information to complete your ERO Portal profile.

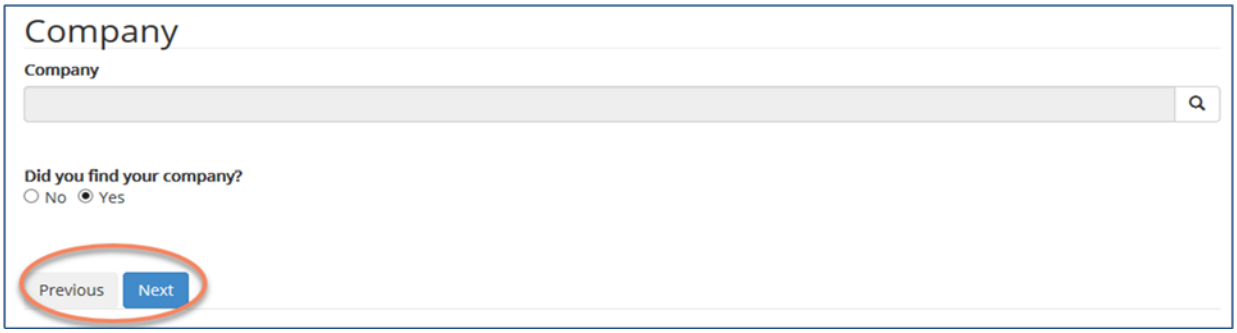
14. Once you have returned to the ERO Portal profile page, you may populate the fields required to complete you ERO Portal profile.



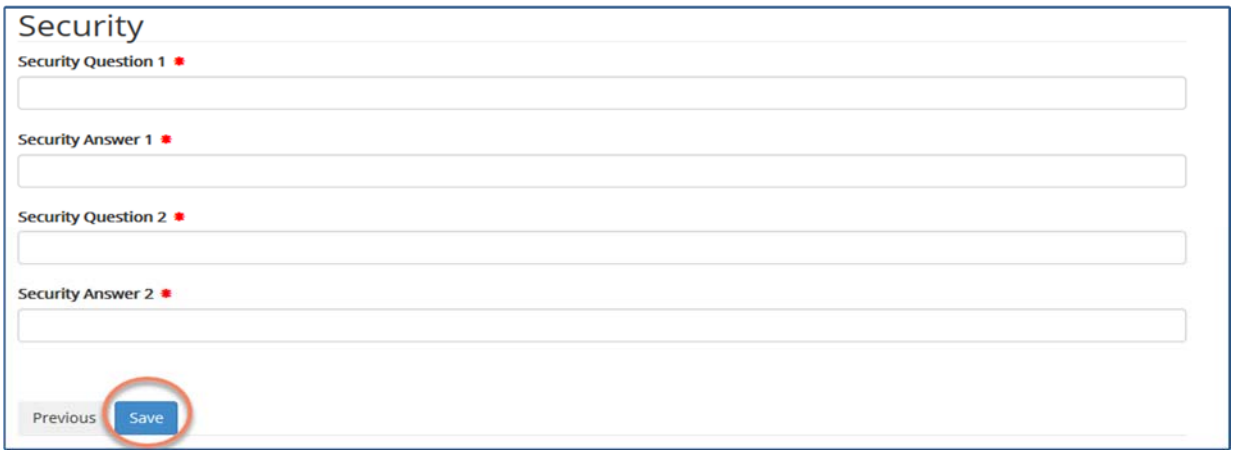
15. The Work Address page below will load, you will need to provide data for any field marked with a red asterisk then click **Next** to continue or **Previous** to return to the previous page**.**



16. 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**.**



17. 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.

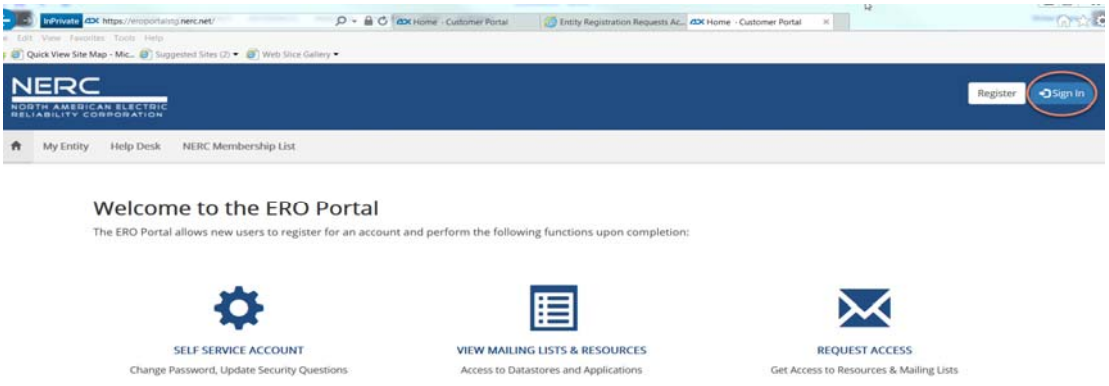


18. Once you click **Save** the system will let you know the process is complete (your ERO Portal registration is completed), see below**.**

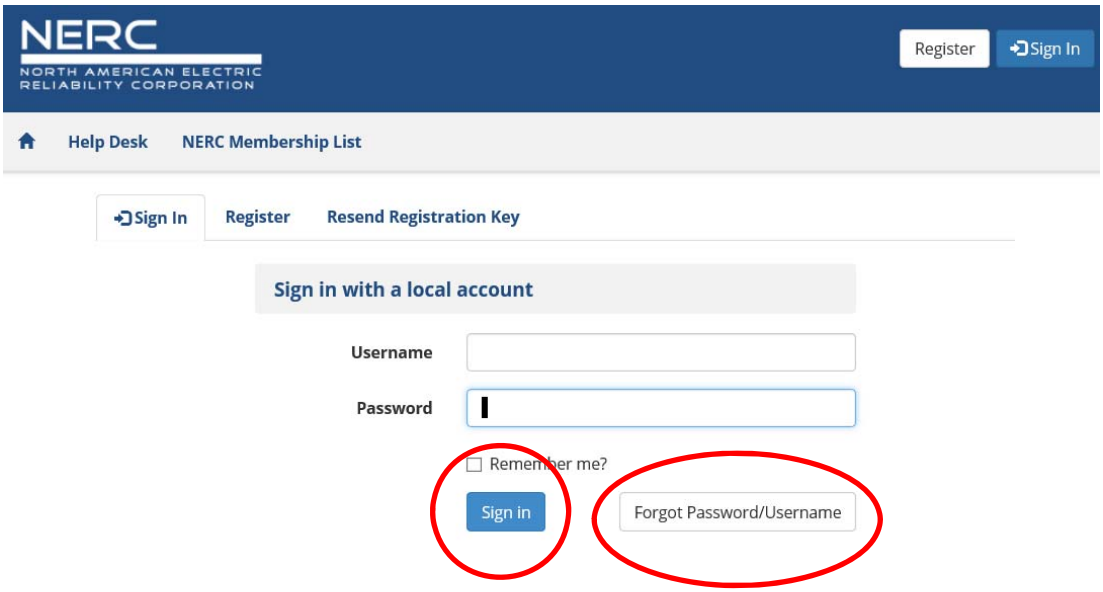
Chapter 2: ERO Portal User Access

User Sign In

1. To log in to an ERO Portal account, click the **Sign In** button located in the upper right hand corner of the page.



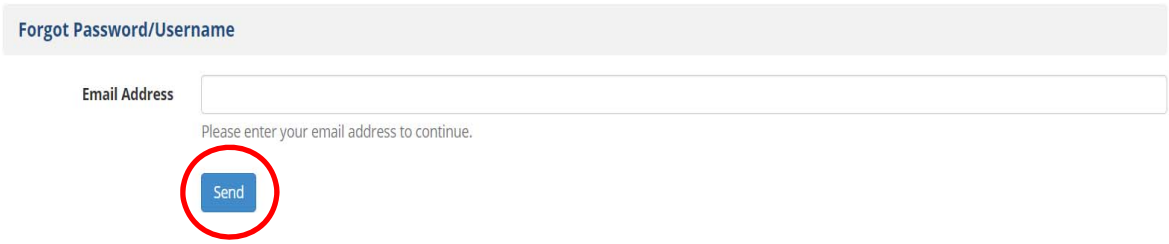
2. Enter valid username and password.
3. Click **Sign In.**



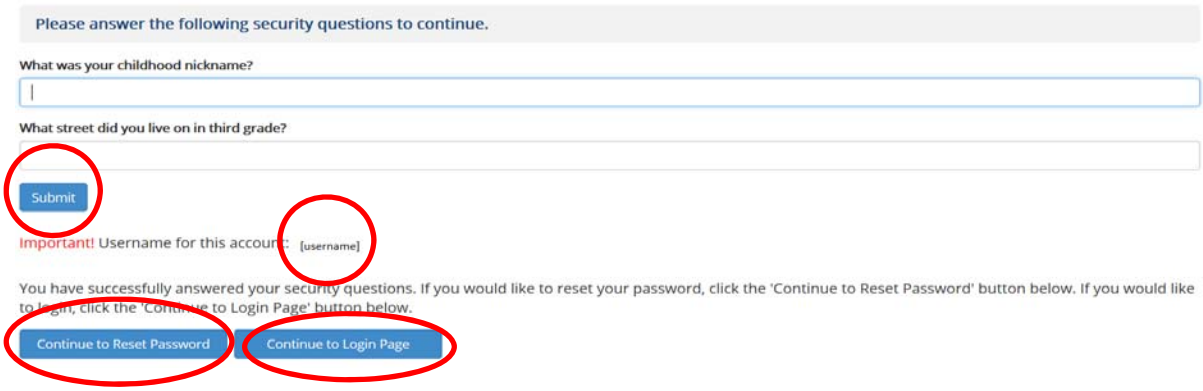
Forgot Password/Username

When needed, users can retrieve their username and reset passwords through the portal.

1. Click **Forgot Password/Username.**
2. Provide the email associated with the account.



3. Click **Send.**
4. The user receives an email with a link.
5. Click the link and provide answers to the security questions.
6. Click **Submit**, the user name is provided if the responses to the security questions are correct.



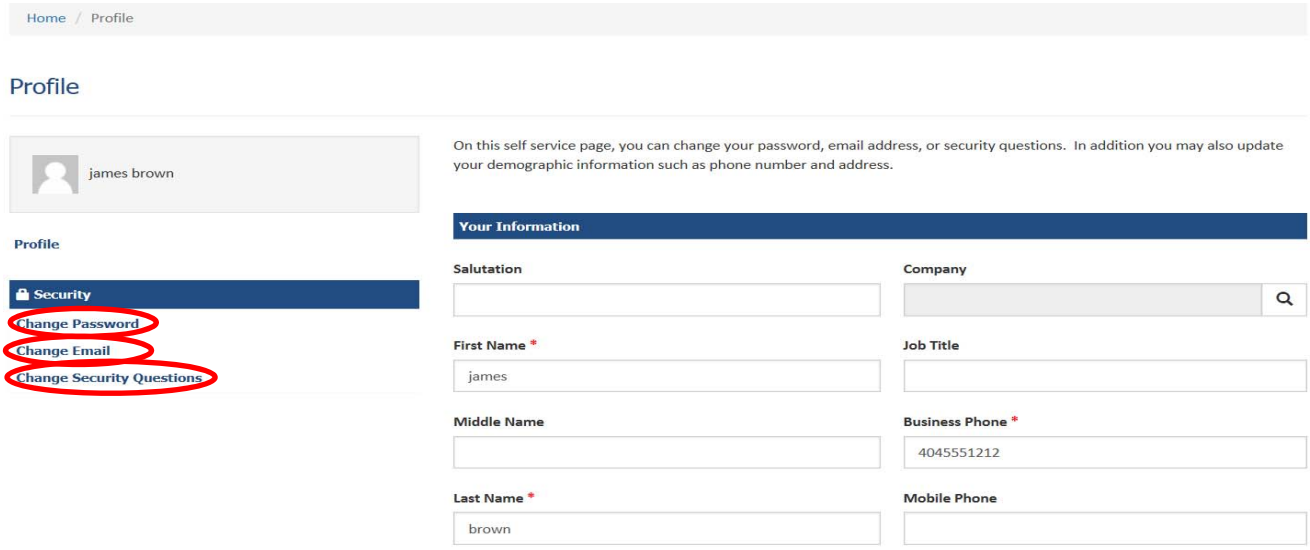
7. Click **Continue to Login Page** if the password is known.
8. To reset the password, click **Continue to Reset Password.**
9. Using the password criteria identified in section 4.2, enter and confirm the new password.
10. Click **Reset.**
11. Return to login page and enter username and password.
12. Click **Submit.**

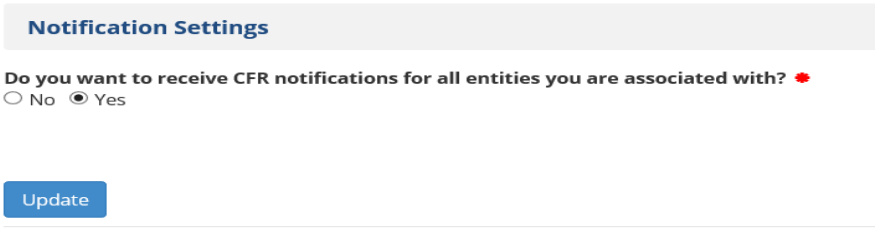
Chapter 3: ERO Portal Profile Management

Update Profile

Clicking on **My Profile** allows for users to access their complete profile.

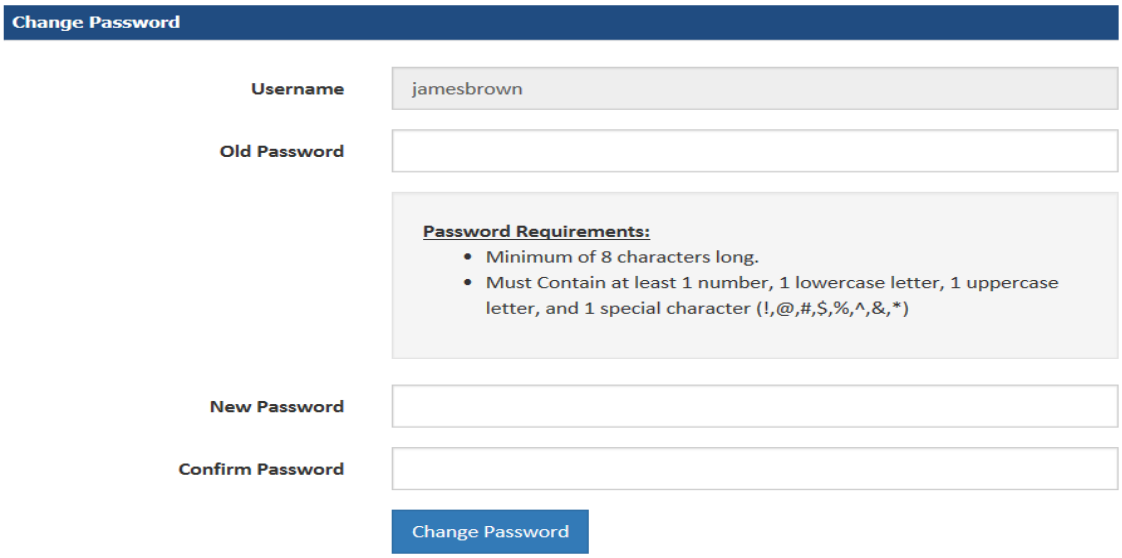
The profile is a self service page where users can update their contact information and subscribe to CFR notifications. Users can also access pages to update their password, email address, and security questions. After changing contact information scroll to the bottom of the page and click **Update** to submit the changes.





Change Password

1. Select **Change Password** from the Profile page.
2. Enter the current password.
3. Enter the new password and a confirmation of the new password.
4. Click **Change Password**.



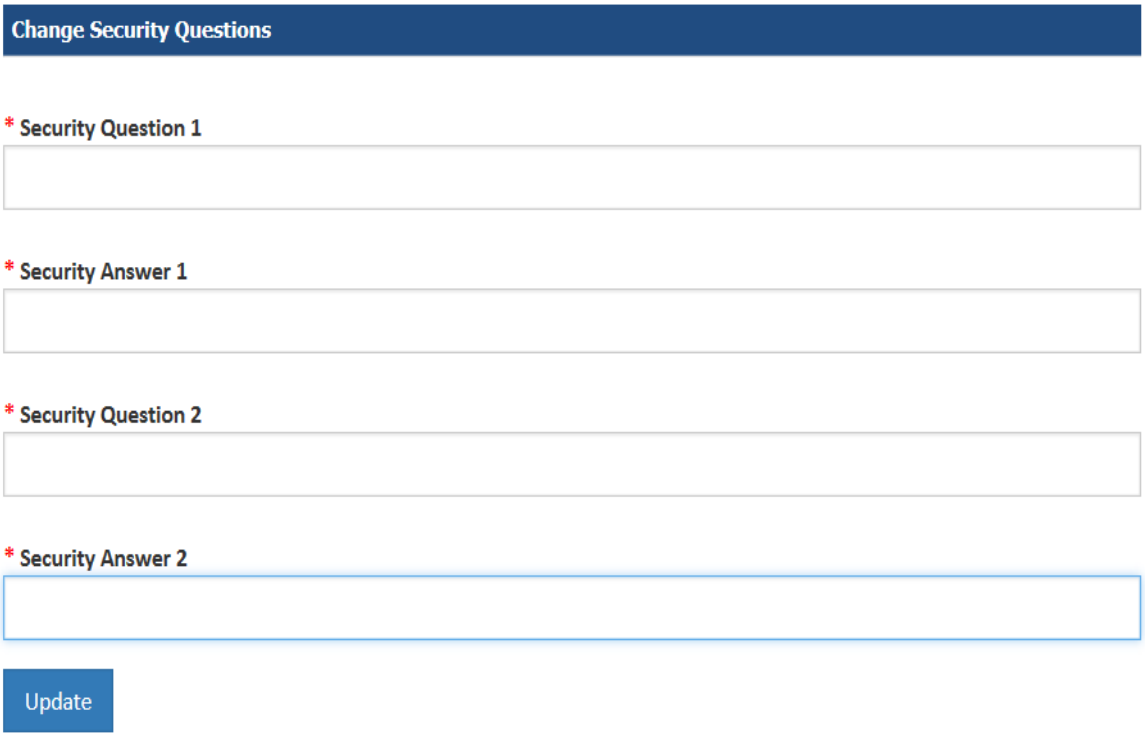
Change Email

Users may change there password in the ERO Portal as long as the domain remains the same. If, for instance, a registered entity changes their domain, the registered entity should contact NERC help desk for assitance.

1. Select **Change Email** from the Profile page.
2. Enter the new Email address.
3. Click **Change Email**.

Change Security Questions

1. Select Change **Security Questions** from the Profile page.
2. Enter new question(s).
3. Enter the new answer(s) to the question.
4. Click **Update.**


Change Security Questions
* Security Question 1
* Security Answer 1
* Security Question 2
* Security Answer 2
Update

Chapter 4: Basic System Functionality of the ERO Portal

My Resources are the applications supported by the ERO Portal in addition to some working groups and NERC committees. Current applications supported by the ERO Portal are:

- Misoperation Information Data Analysis System (MIDAS)
- Coordinated Functional Registration (CFR) Tool
- Centralized Organization Registration ERO Systems (CORES)
- Align

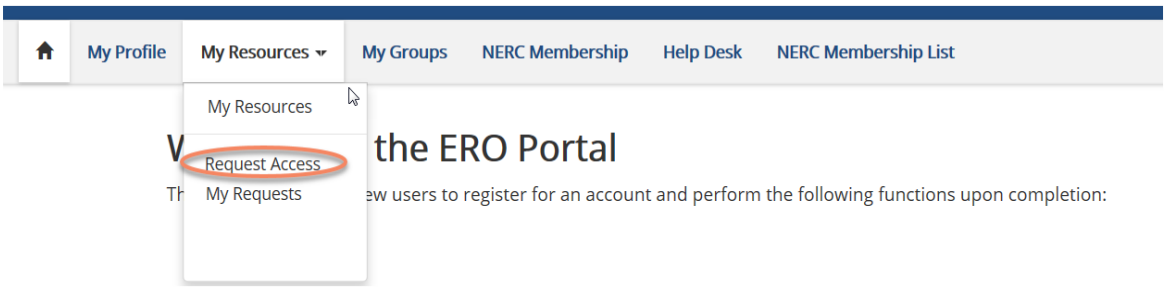
Access to Resources

Individuals can request access to the list of Resources listed in the ERO Portal. Currently the four applications identified above are being supported by the ERO portal in addition to various NERC working groups and committees.

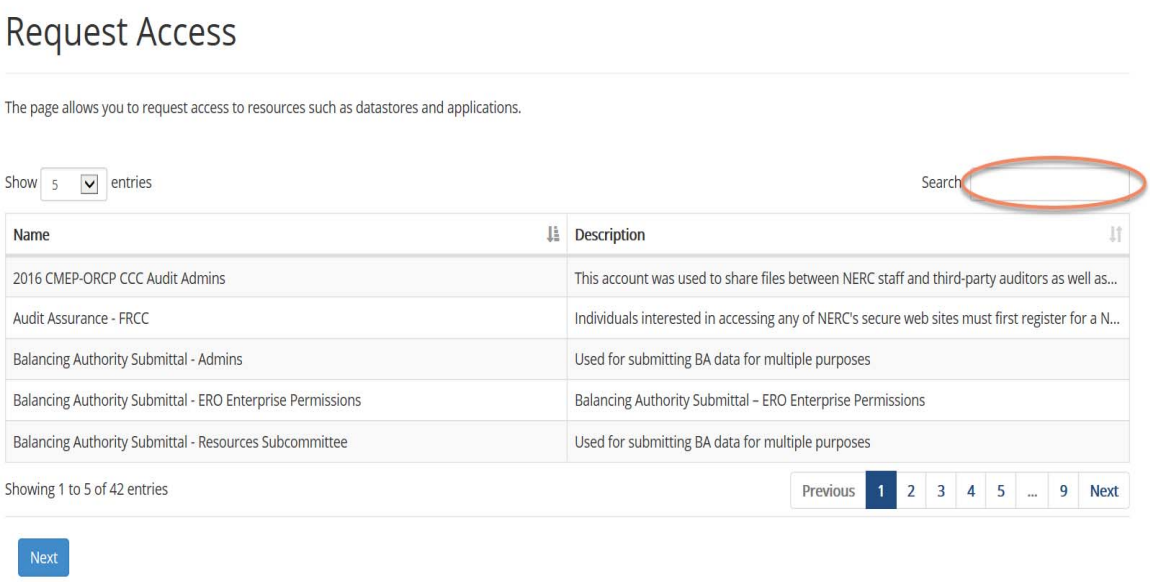
The preferred method for requesting access to four applications is to request the registered entity's ERO Portal administrator to grant access to the necessary application. Each registered entity is responsible for vetting the accesses being granted on behalf of their company. Therefore the administrator can grant access without involving NERC. The administrator grants access per the steps provided in Chapter 5 of this guide.

All other requests are submitted through the ERO Portal itself. Requests submitted for the four applications through the portal are forwarded directly to the registered entity ERO Portal administrators for processing. Requests for access to NERC working groups and committees are processed by NERC.

1. Click the down arrow **My Resources** on the top tool bar.
2. Click **Request Access.**

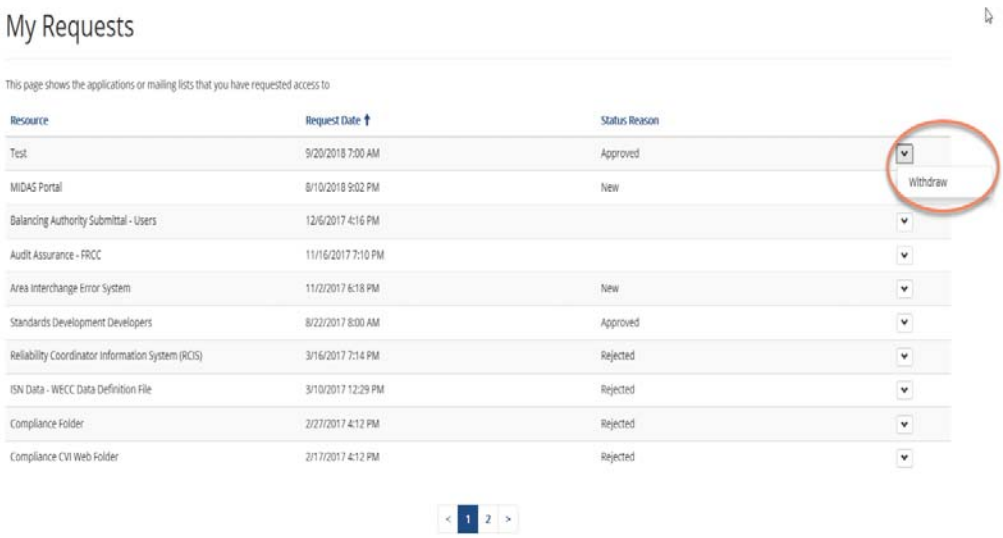


3. Select the resource and highlight the selected resource:
   a. Scroll through the lists of resources (or),
   b. Enter the name of the resource in the search box.
   c. Highlight the application or group.
4. Click **Next.**



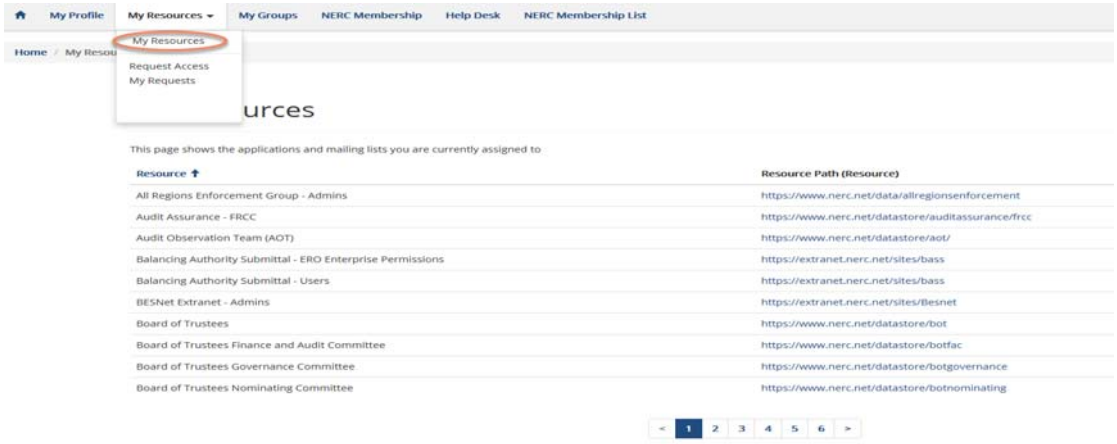
5. Provide the general information about your manager.
6. Click **Next** to submit the request.

7. Click My Requests to check the status of the submitted requests.
8. To remove a request:
   a. Click the **down arrow** to the right of the resource.
   b. Click **Withdraw.**



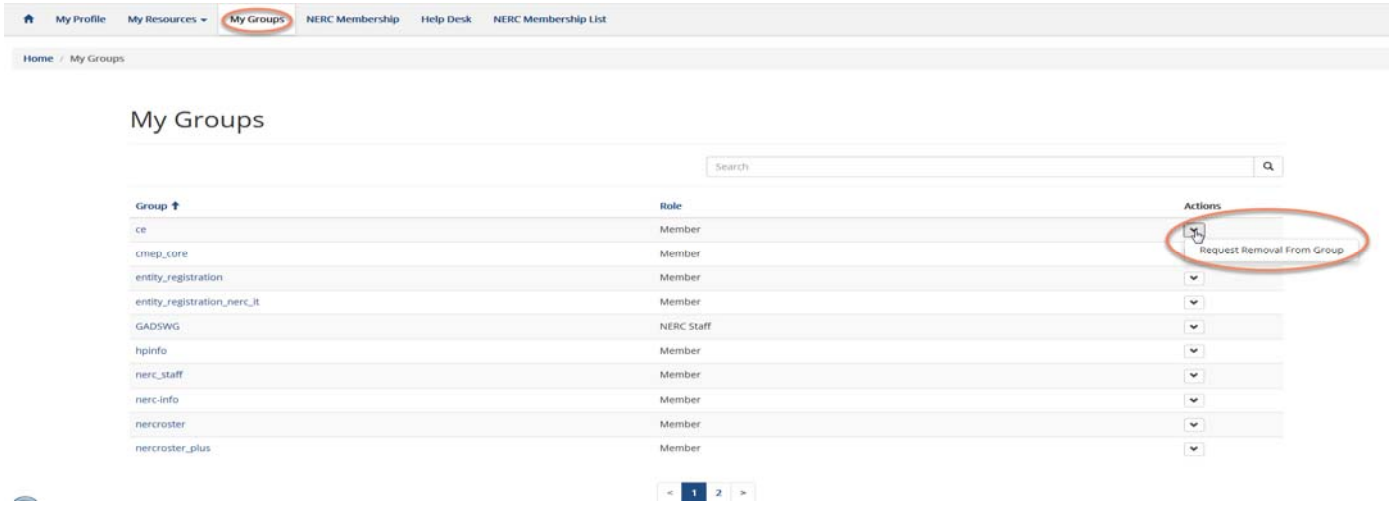
View Resources

Users can review all Resources they have access to through the ERO Portal. Click the **down arrow** beside My Resources to view all Resources on the top toolbar.



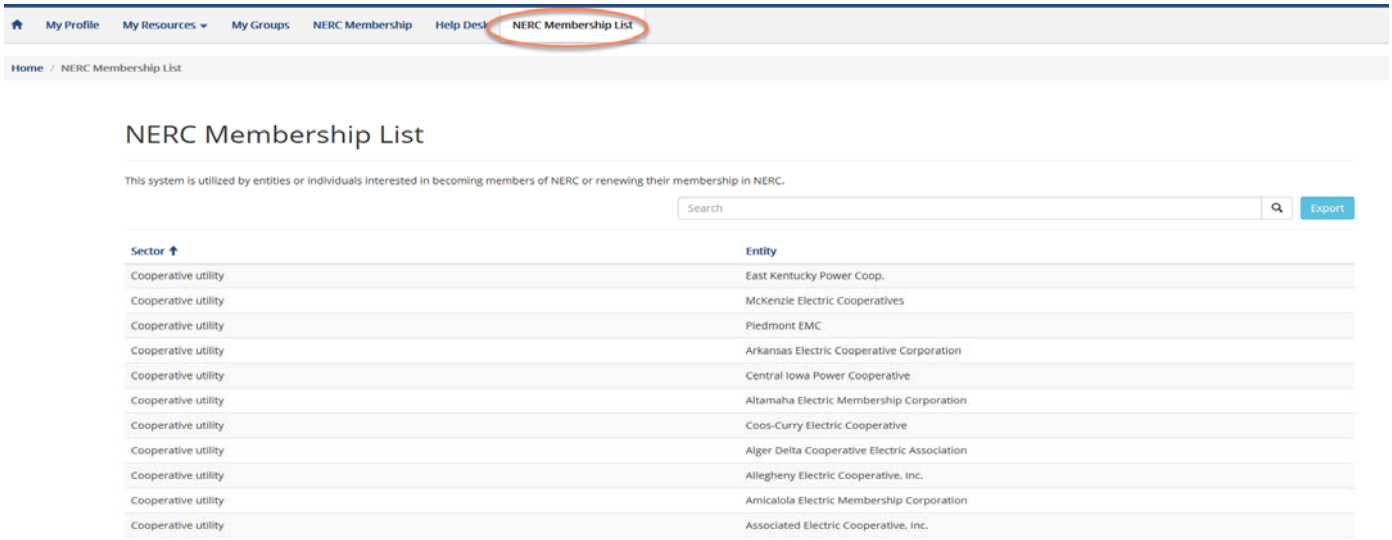
My Groups

A list of NERC email distribution lists users are associated with are available by clicking My Groups on the top toolbar. Users can request removal from a distribution list by clicking the **down arrow** in the Actions column.



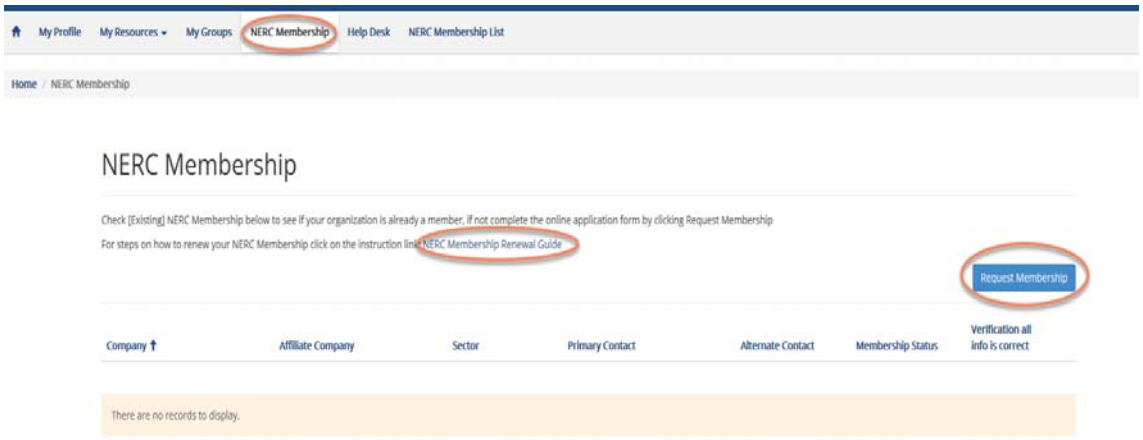
NERC Membership

A list of all NERC Members is available through the ERO Portal. Click **NERC Membership List** for a complete list of NERC Members.

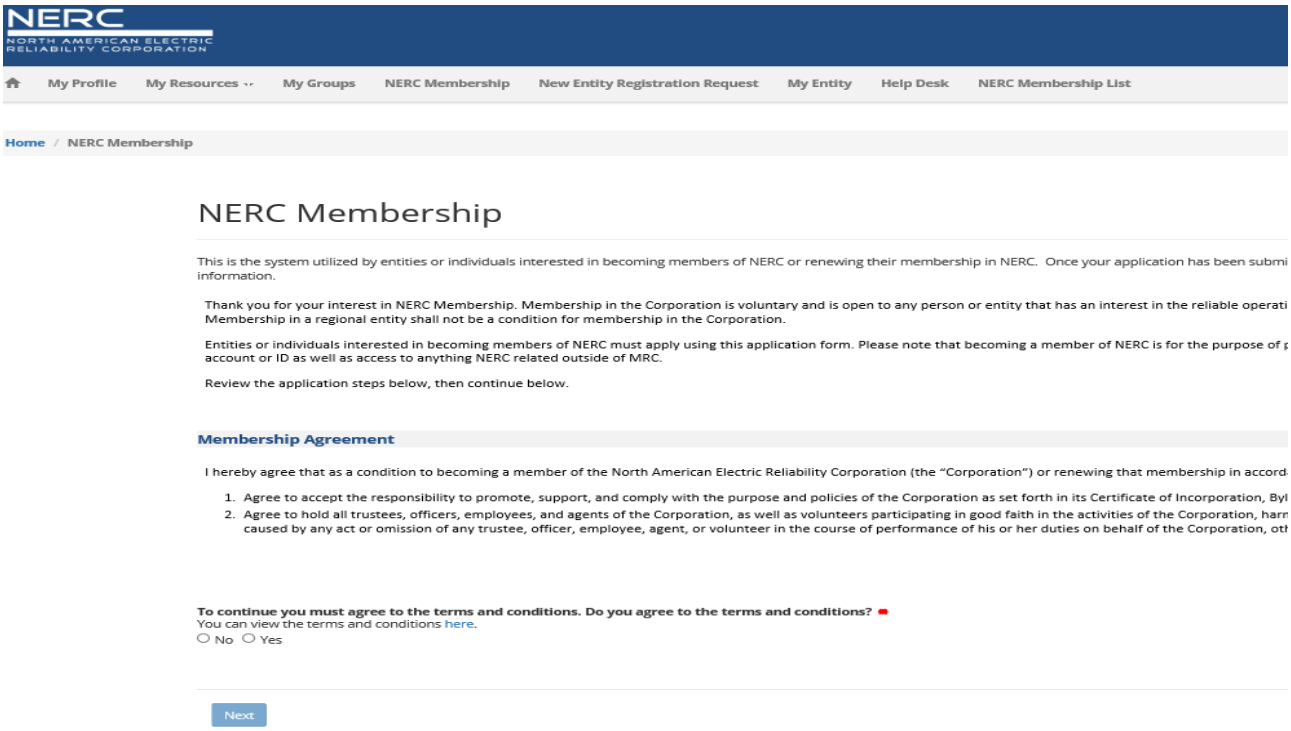


Organizations not listed as a NERC Member can request membership through the ERO Portal.

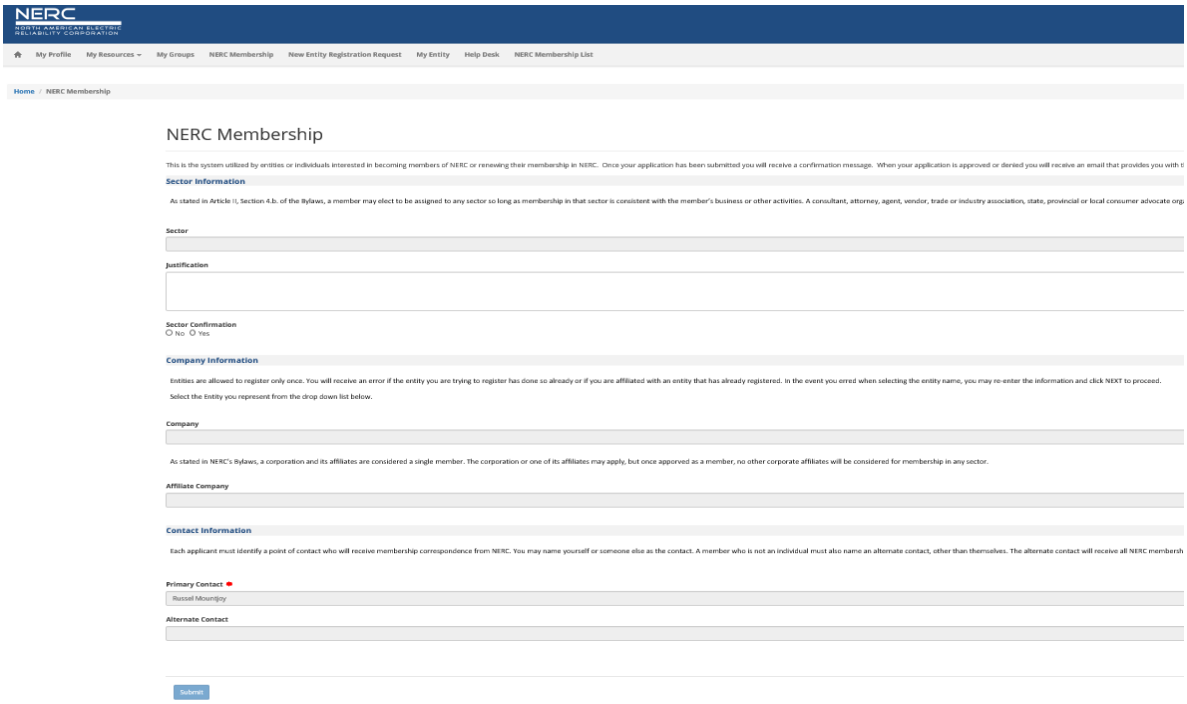
1. On the top toolbar Click **NERC Membership.**
2. Click **Request Membership.**



3. Review the Membership Agreement
4. Click **Yes** to agree with them Membership Agreement.
5. Click **Next.**



6. Complete the NERC Membership Application Form.


NERC
NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION
My Profile
My Resources
My Groups
NERC Membership
New Entity Registration Request
My Entity
Help Desk
NERC Membership List
Home / NERC Membership
NERC Membership
This is the system utilized by entities or individuals interested in becoming members of NERC or renewing their membership in NERC. Once your application has been submitted you will receive a confirmation message. When your application is approved or denied you will receive an email that provides you with t
Sector Information
As stated in Article II, Section 4.b. of the Bylaws, a member may elect to be assigned to any sector so long as membership in that sector is consistent with the member's business or other activities. A consultant, attorney, agent, vendor, trade or industry association, state, provincial or local consumer advocate org
Sector
Justification
Sector Confirmation
No Yes
Company Information
Entities are allowed to register only once. You will receive an error if the entity you are trying to register has done so already or if you are affiliated with an entity that has already registered. In the event you erred when selecting the entity name, you may re-enter the information and click NEXT to proceed.
Select the Entity you represent from the drop down list below.
Company
As stated in NERC's Bylaws, a corporation and its affiliates are considered a single member. The corporation or one of its affiliates may apply, but once approved as a member, no other corporate affiliates will be considered for membership in any sector.
Affiliate Company
Contact Information
Each applicant must identify a point of contact who will receive membership correspondence from NERC. You may name yourself or someone else as the contact. A member who is not an individual must also name an alternate contact, other than themselves. The alternate contact will receive all NERC membersh
Primary Contact
Russell Mountjoy
Alternate Contact
Submit

Chapter 5: Entity Administrator Tutorials

Actions Available for an Entity Administrator

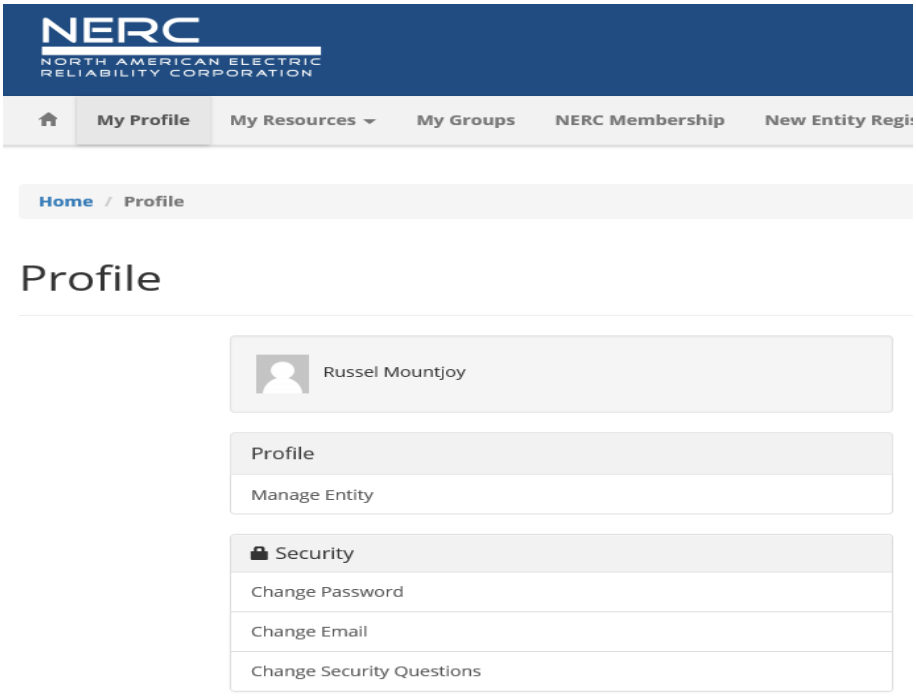
The registered entity Administrator has the authority to grant rights to its systems to other ERO Portal users. The Entity Admin has overall rights to grant permissions for the registered entity. Administrator rights allow individuals to assign the administrator rights to other users and grant user, reporter and read-only permissions. Users and Reporters have permissions to submit data through the ERO Portal and Read-only allows for users to view the data only. The complete list of permissions available is:

- CFR Administrator
- CFR User
- MIDAS Entity Admin
- MIDAS Reporter
- MIDAS Read-only
- Entity Admin

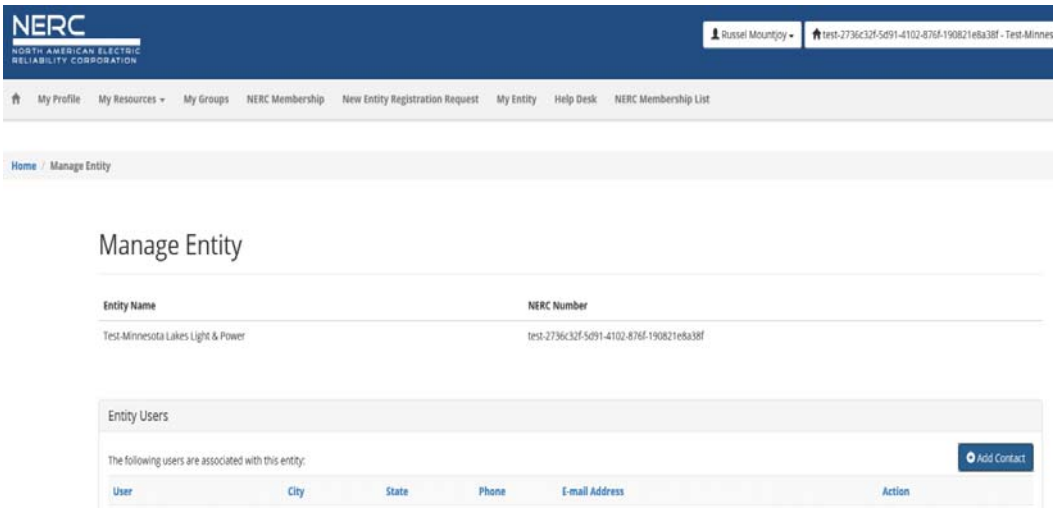
Grant Permissions

The Entity Admin and their delegates grant permissions from their Profile page.

1. Click **My Profile** on the upper toolbar
2. Click **Manage Entity**

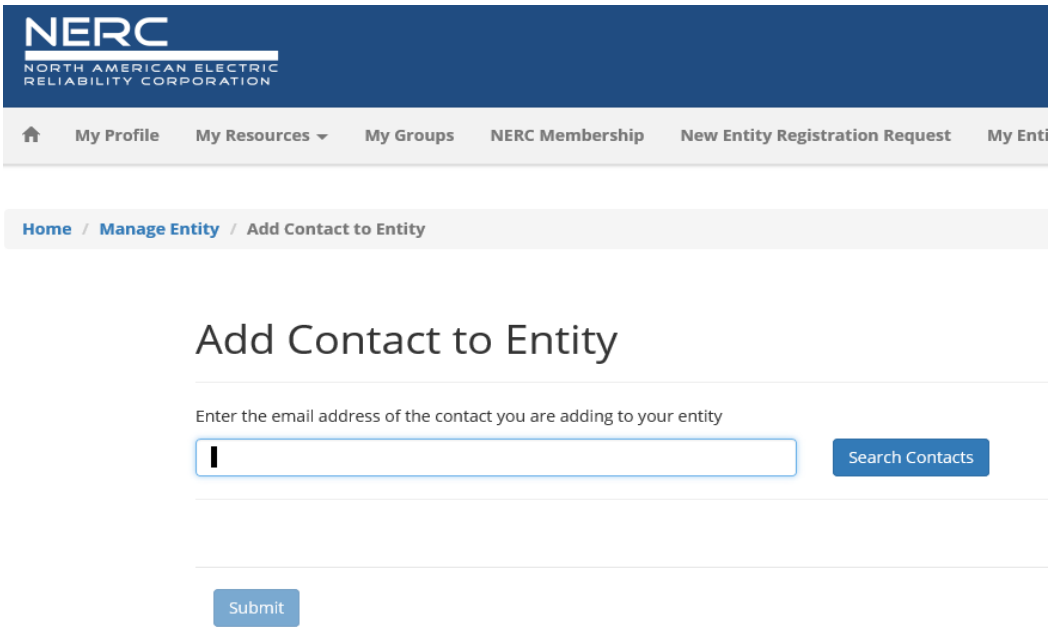


a. Grant permissions to new Entity User



i. Click **Add Contact**

ii. Enter email address of user being granted permission



iii. Highlight user

iv. Click **Next**

v. Click **Edit**

vi. Select permissions being granted to the individual

vii. Submit

b. Grant Permission to exiting Entity User

i. From Mange Entity page, click User

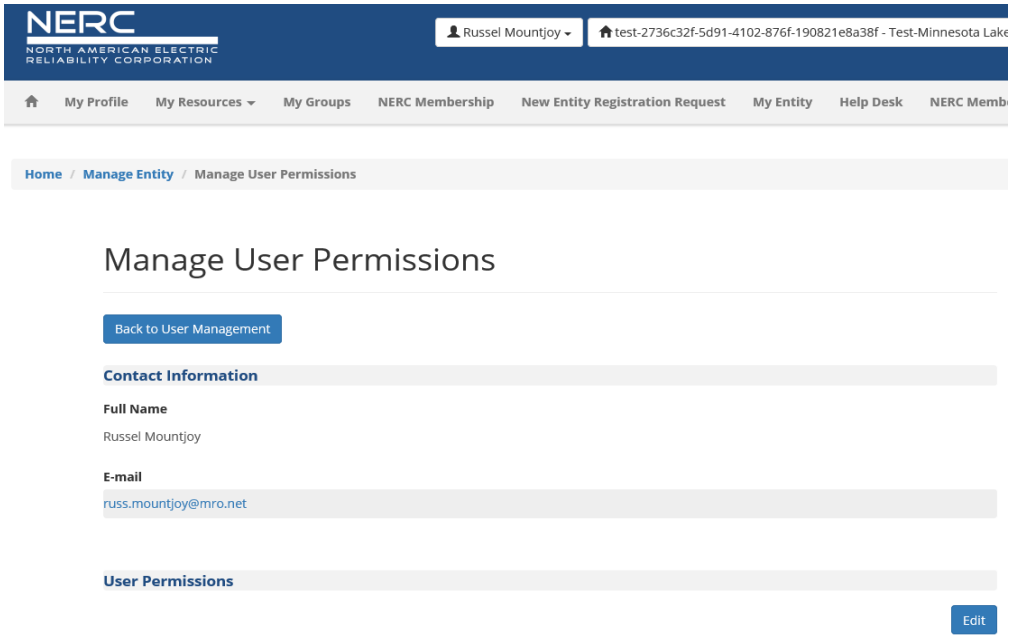
ii. Click Edit

iii. Select permission(s) being granted

iv. Submit

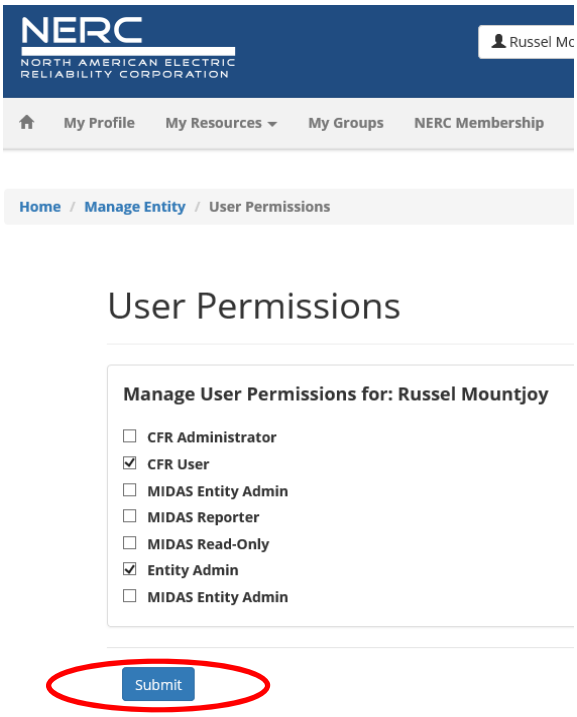
v. Select permission(s) being granted

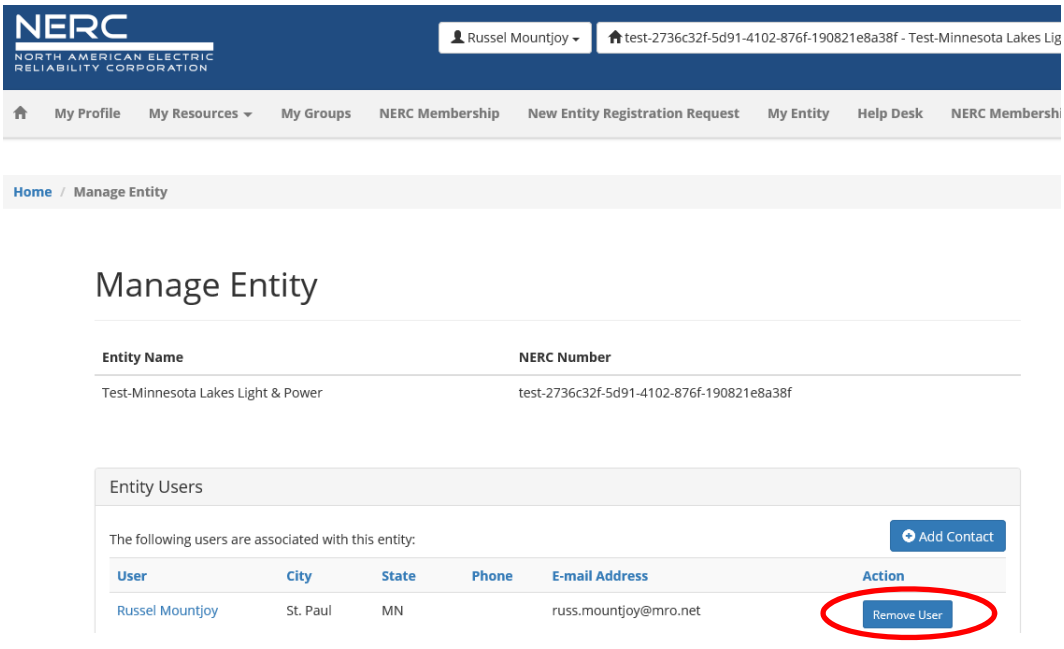
vi. Submit



vii. Select permission(s) being granted

viii. Submit



Revoke Permissions

1. Click **My Profile** on the upper toolbar
2. Click **Manage Entity**
3. Locate Entity User and click **Remove User**