

NERC

NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

ERO Portal

End User Guide: Portal Users

December 15, 2022

RELIABILITY | ACCOUNTABILITY



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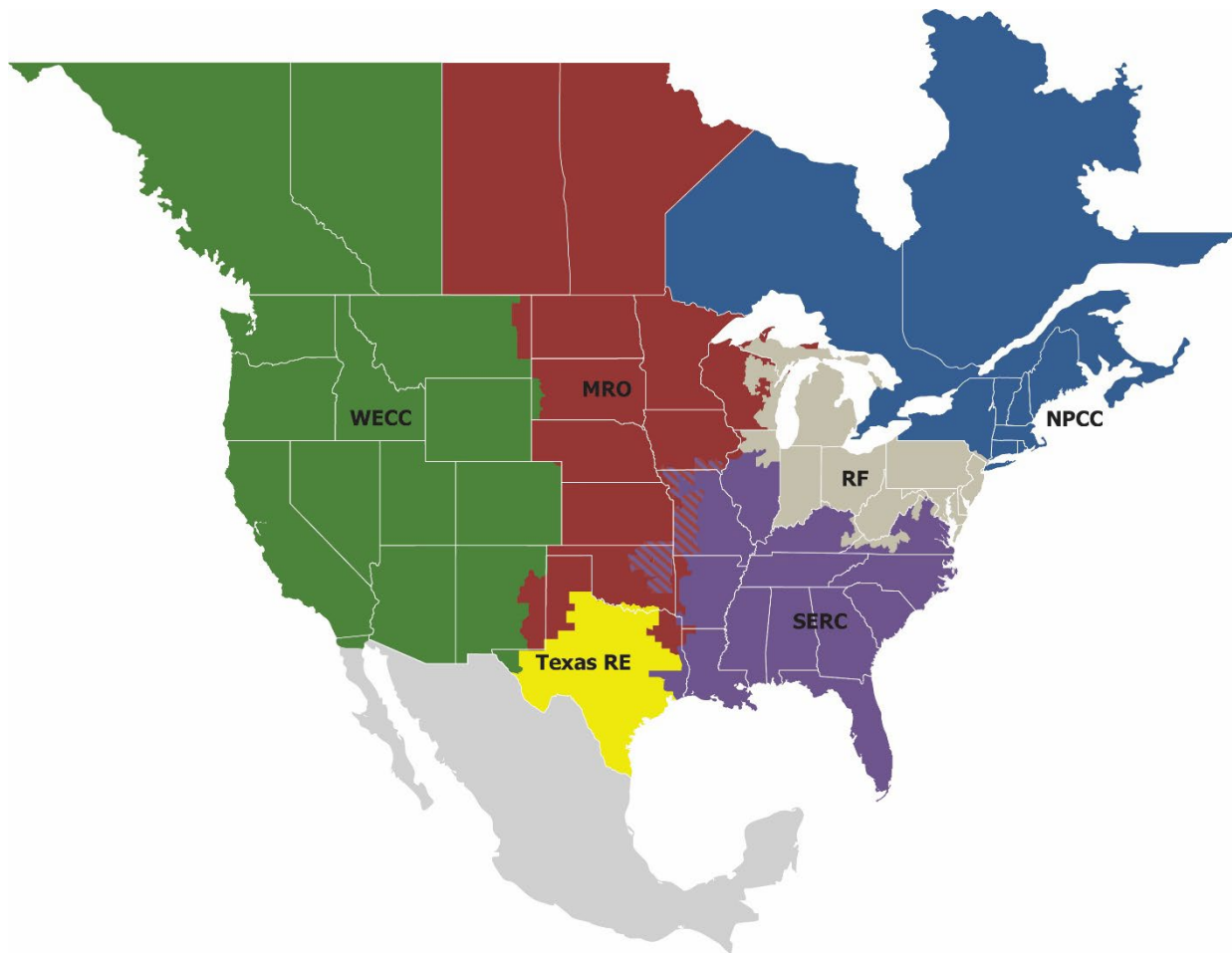
Table of Contents

Preface	iii
Introduction	iv
ERO Portal.....	iv
Resources.....	iv
Groups	v
NERC Membership and NERC Membership List	v
ERO Portal Actors.....	vi
Chapter 1 : Getting Started	1
Setup and Configuration.....	1
ERO Portal Registration	1
Access ERO Portal	1
Register for ERO Portal Account	1
Chapter 2 : ERO Portal User Access	11
User Sign In.....	11
Forgot Password/Username.....	11
Chapter 3 : ERO Portal Profile Management	13
Update Profile	13
Change Password	13
Change Email	14
Change Security Questions.....	14
Chapter 4 : Basic System Functionality of the ERO Portal	16
Access to Resources	16
View Resources	17
My Groups	18
NERC Membership	19
Chapter 5 : Entity Administrator Tutorials.....	21
Actions Available for an Entity Administrator	21
Grant Permissions.....	21
Revoke Permissions	24

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 a user's ERO Portal Account password
- Change the Security Questions for a user's 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
- Update access permissions for ERO Portal Applications and external applications, such as Align

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.

My Profile

My Profile is a self-service page for a user to change password, email address, security questions, phone number, and address. A user will also be able to see Contact Roles and turn on/off CFR notifications.

My 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. A user may **Request Access** and review **My Requests** via the drop down box.

My Applications

My Applications is the self-service feature for users to request application access and manage requests. Users may **Request Application Access** for Align, CORES, GMD, and MIDAS.

Application	Role	Role Description
All Applications	Entity Administrator	This person has read and write access to 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.
ALIGN	Align Registered Entity Editor	This person can create and edit items in Align for the Entity he/she is associated with.
ALIGN	Align Registered Entity Reader	This person can view items in Align for the Entity he/she is associated with.
ALIGN	Align Registered Entity Submitter	This person can create/edit and submit items in Align for the Entity he/she is associated with, and submit evidence to the Secure Evidence Locker.

CORES	CORES User	This person can create/edit registration information (including CFRs/JROs) and review data for the entity he/she is associated with
GMD	GMD User	This person can view and submit GMD data and run GMD reports for the entity he/she is associated with.
GMD	GMD Read-Only	This person can view GMD data and run GMD reports for the entity he/she is associated with.
MIDAS Portal	MIDAS User	This person can create/edit and submit MIDAS data and run MIDAS reports for the entity he/she is associated with.
MIDAS Portal	MIDAS Read-Only	This person can view MIDAS data and run MIDAS reports for the entity he/she is associated with.

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.

[Create New Application Access Request](#)

Menu

[Request Application Access](#)
Request access to an ERO Portal application (GMD, CFR Portal or MIDAS)

NERC Number (Entity)	Entity	Requested Application Role	Request Status	Approved By	Rejected By	Created On ↑	Modified On
----------------------	--------	----------------------------	----------------	-------------	-------------	--------------	-------------

There are no records to display.

Entity Administrators are emailed a notification that there are pending requests and they may review and approve or reject the requests. This is the preferred method for granting access for entity colleagues to Align, CORES, GMD and MIDAS.

Research

Users interested in reviewing Geomagnetic Disturbance (GMD) Data Downloads may access them here.

My Groups

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

Entity Registration Requests

A user may initiate a new request for registration on the NERC Compliance Registry. A separate user guide exists to assist users with registration and can be found on the NERC.com Organization Registration website. A registration request may be submitted by any user.

My Entity

A user may review the data that exists for their entity. The options include **Manage Entity Users**, **CORES**, **Entity Application Requests** and **Section 1600 Reporting Confirmation**.

NERC Membership List

NERC Membership provides the opportunity for companies to join one 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.

Help Desk

A user may request help with a selection of services using this page. Alternatively, users may navigate to <https://support.nerc.net>.

NERC Membership

NERC Membership provides the opportunity for companies to join one of 12 industry sectors. A user may request membership using this page.

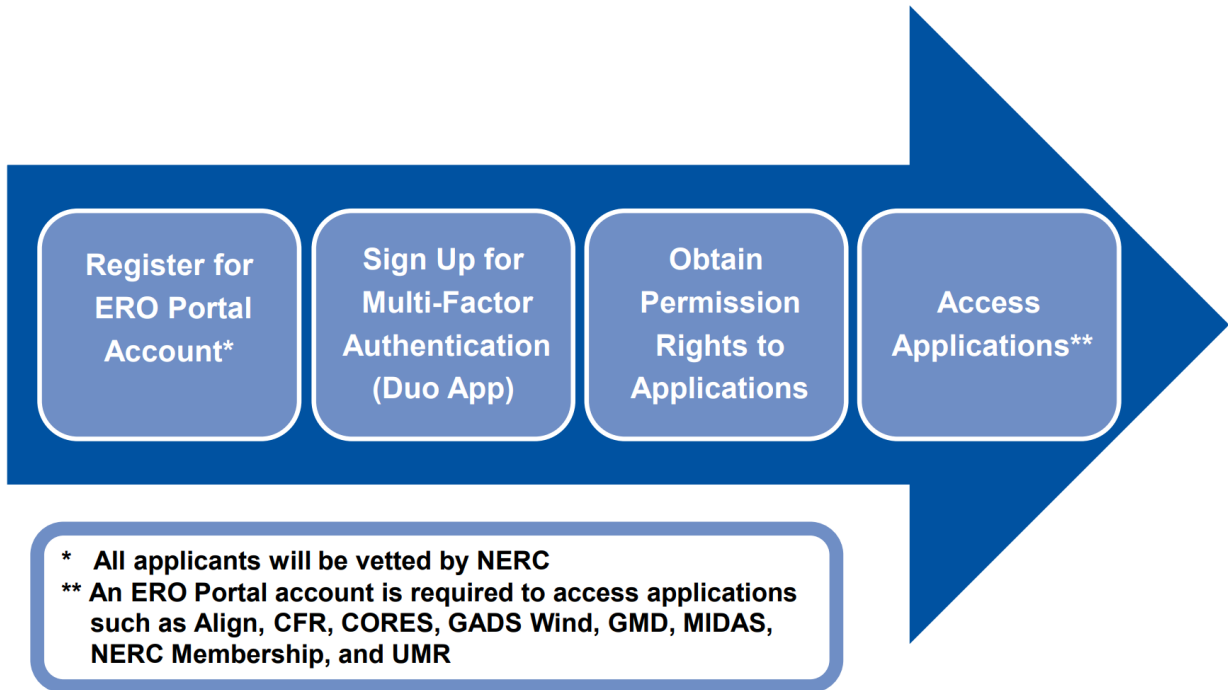
ERO Portal Actors

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

Chapter 1: Getting Started

Overview, 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.

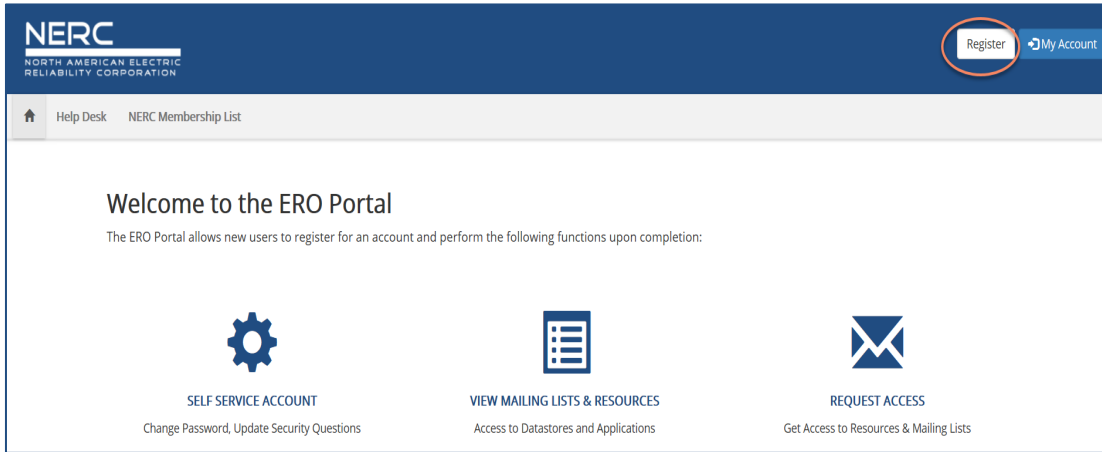
Register for ERO Portal Account

Initial Set-up

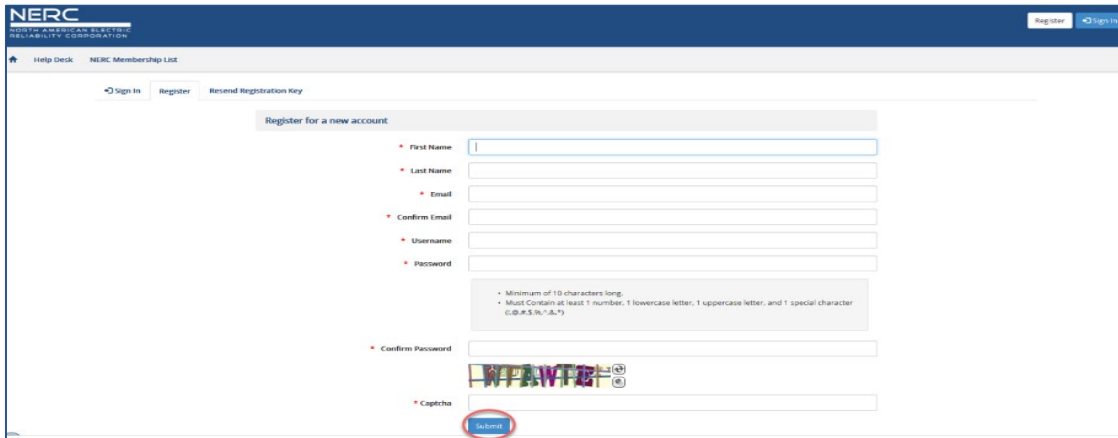
If you do not already have an ERO Portal account, you must first register for a new account. The ERO Portal can be found here: <https://eroportal.nerc.net>.

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

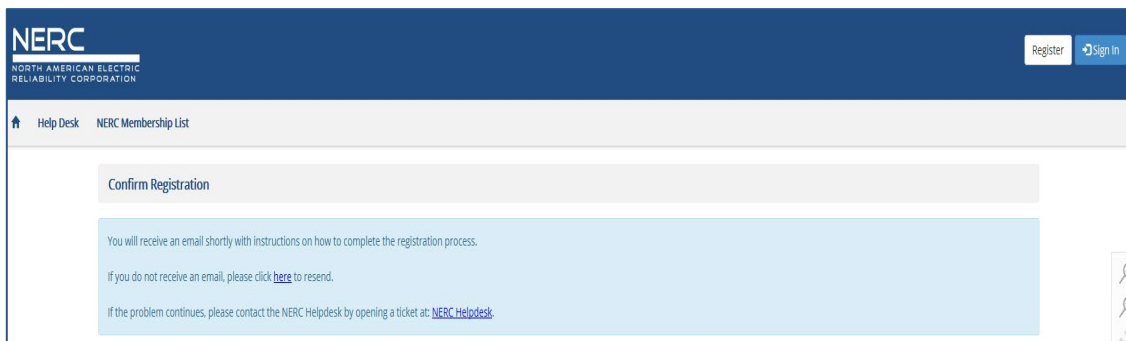
1. Select the **REGISTER** button in the upper right hand corner.



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



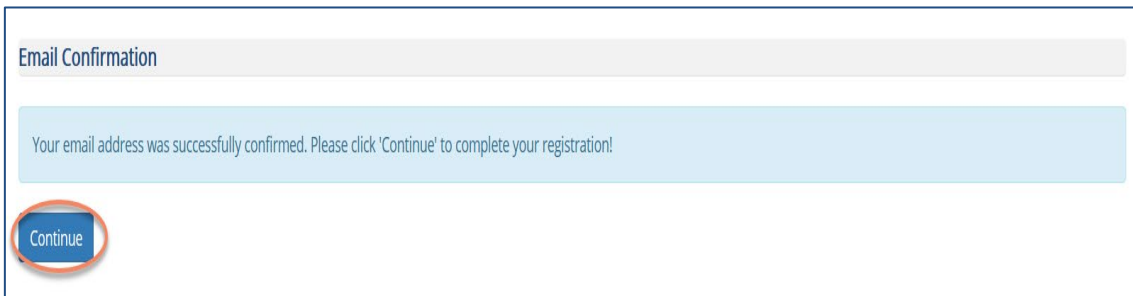
3. Once you click **Submit** the system, a confirmation message similar to the one below will be automatically sent from the system.



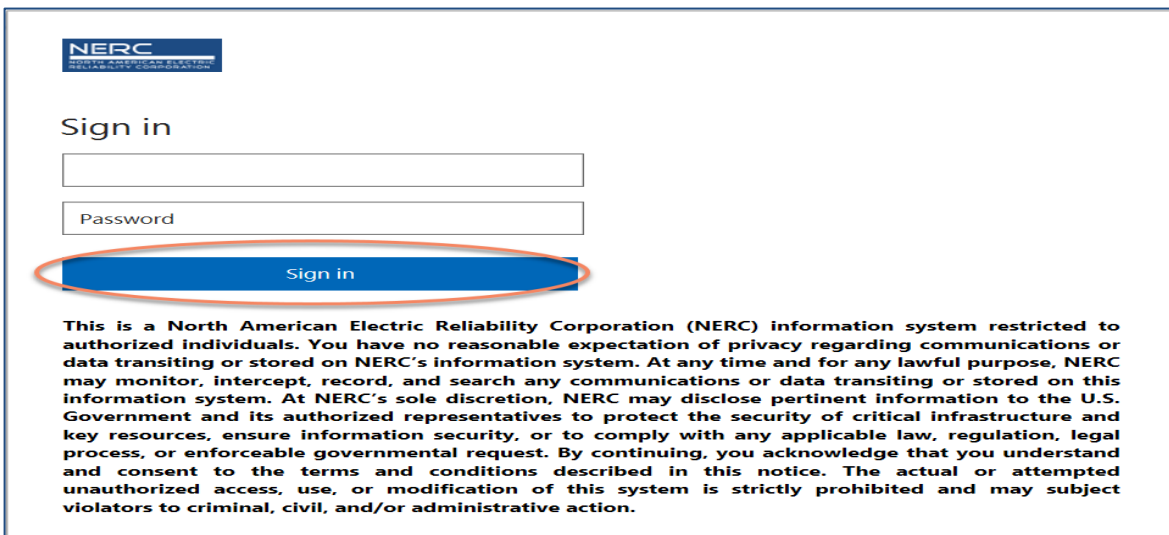
Login to your email inbox (the email address you entered above) to find the instructions on how to continue an example is shown below, click the **Confirm Your Email** link from the email to complete the registration process.



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

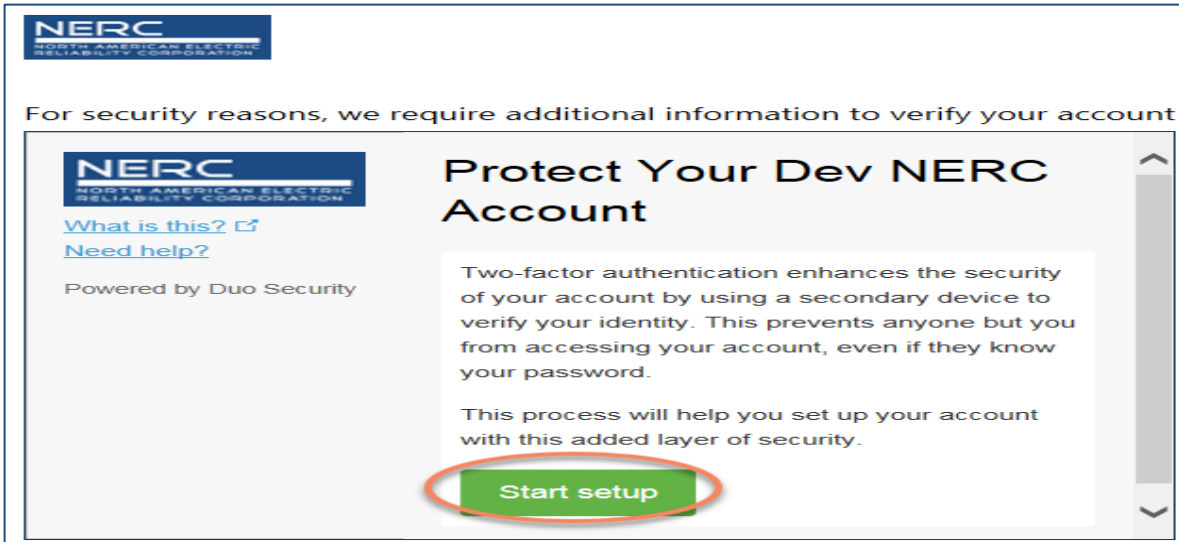


- 5. The login page below will load, you will need to enter the username and password you used on the registration page then click the **Sign in** button to continue.

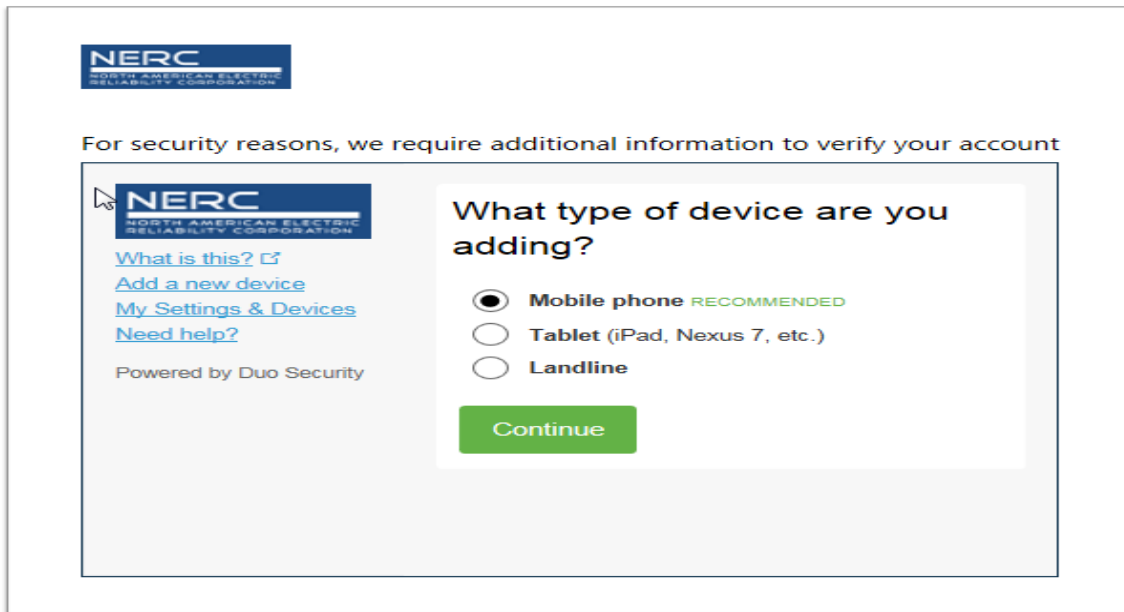


Multi-Factor Authentication – Duo

- 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.)



- 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.



- 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.

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For security reasons, we require additional information to verify your account

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[What is this?](#) [Need help?](#)

Enter your phone number

United States

+1 ✓

Example: (201) 234-5678

You entered (404) 849-2431. Is this the correct number?

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

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For security reasons, we require additional information to verify your account

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[What is this?](#) [Need help?](#)

Powered by Duo Security

What type of phone is 404-640-2876?

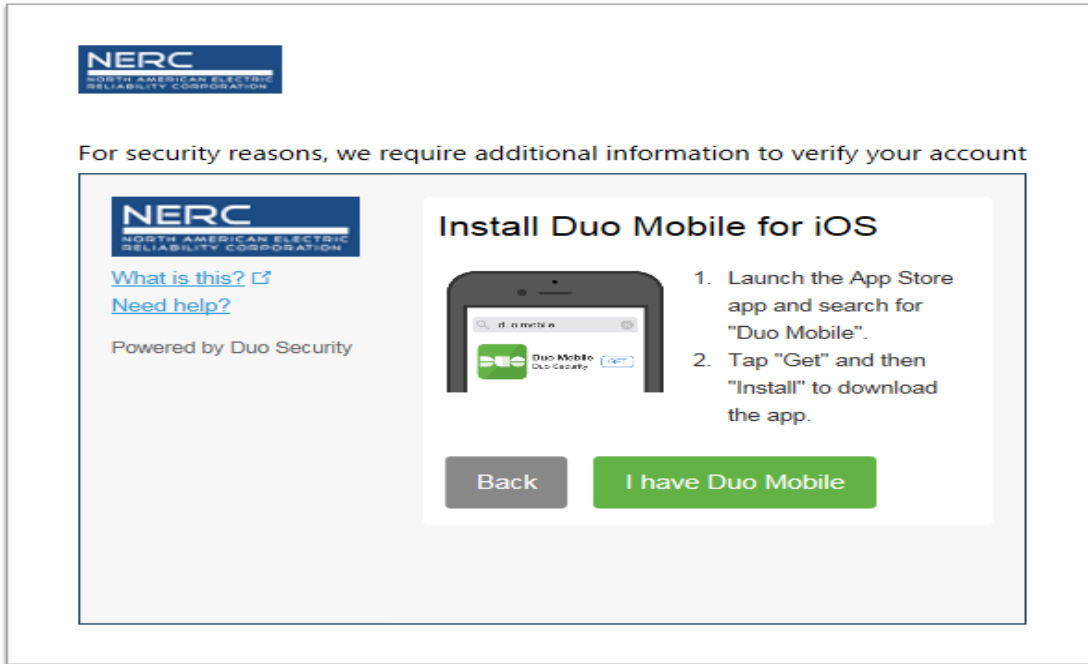
iPhone

Android

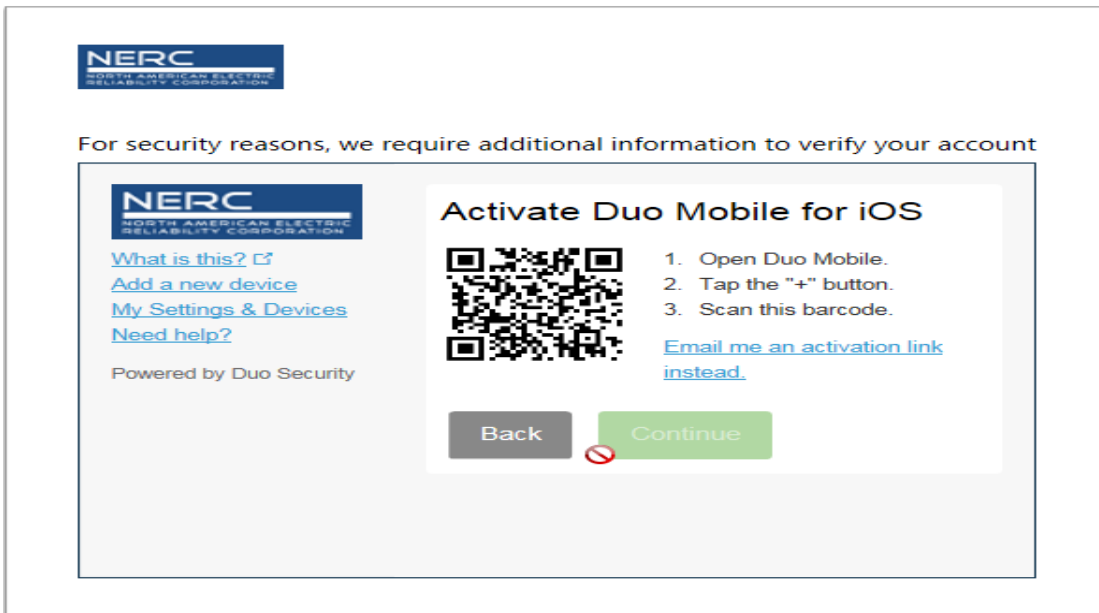
Windows Phone

Other (and cell phones)

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

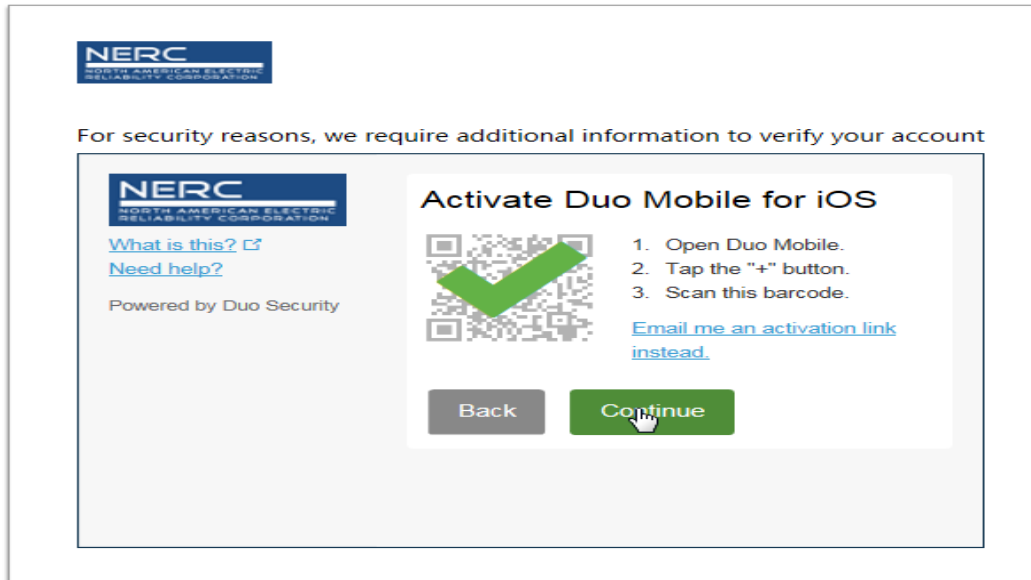


11. Once you have downloaded and installed the Duo Mobile app to your mobile device, or, if the Duo app is already installed on your device select the **"I have Duo Mobile"** button. The *Activate Duo Mobile* screen will appear with a QR code displayed.

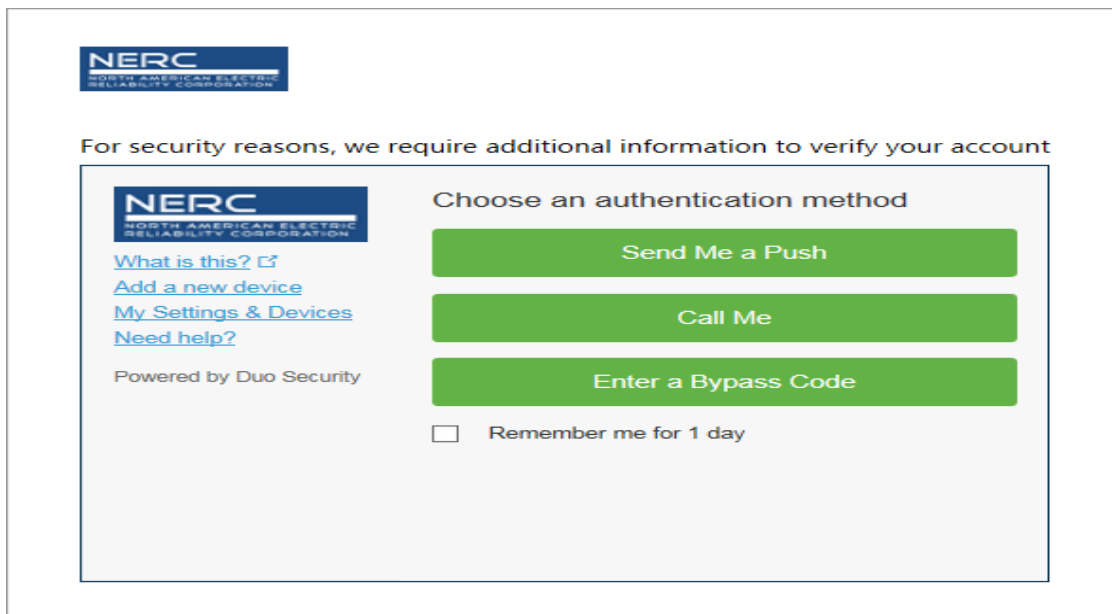


12. Follow the steps below to activate your mobile device for Multi-Factor Authentication (MFA) for the ERO Portal. You will only have to do this once.
 - Open the app and tap the "+" button in the app to add a new ERO Portal account to Duo Mobile
 - If you are prompted to allow Duo Mobile to send your 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.



ERO Portal Profile Completion

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

A screenshot of the "Profile" page in the ERO Portal. On the left, there is a sidebar with a user profile for "jay smooove" and sections for "Profile" (Manage Entity) and "Security" (Change Password, Change Email, Change Security Questions). The main content area contains a "Personal" form with fields for Salutation, Job Title, Business Phone, Fax, First Name (filled with "jay"), Middle Name, Last Name (filled with "smooove"), and Mobile Phone. A "Next" button is circled in red at the bottom. Two warning messages are visible: "You must complete your profile before using the features of this website." and "Please note, if you are the Primary Compliance Contact for an entity registered for NERC compliance, you will not be able to change your profile information here. You must navigate to your regional compliance portal to update your information. You will see those changes reflected here the day after you make the update."

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.

My Work Address

Street 1

City *

Street 2

State/Province *

ZIP/Postal Code *

Country *

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.

Company

Company

Did you find your company?
 No Yes

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.

Security

Security Question 1 *

Security Answer 1 *

Security Question 2 *

Security Answer 2 *

[Previous](#) [Save](#)

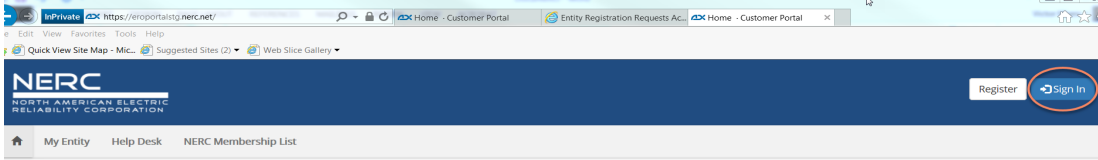
18. Once you click **Save** the system will let you know the process is complete (your ERO Portal registration is completed), see below.



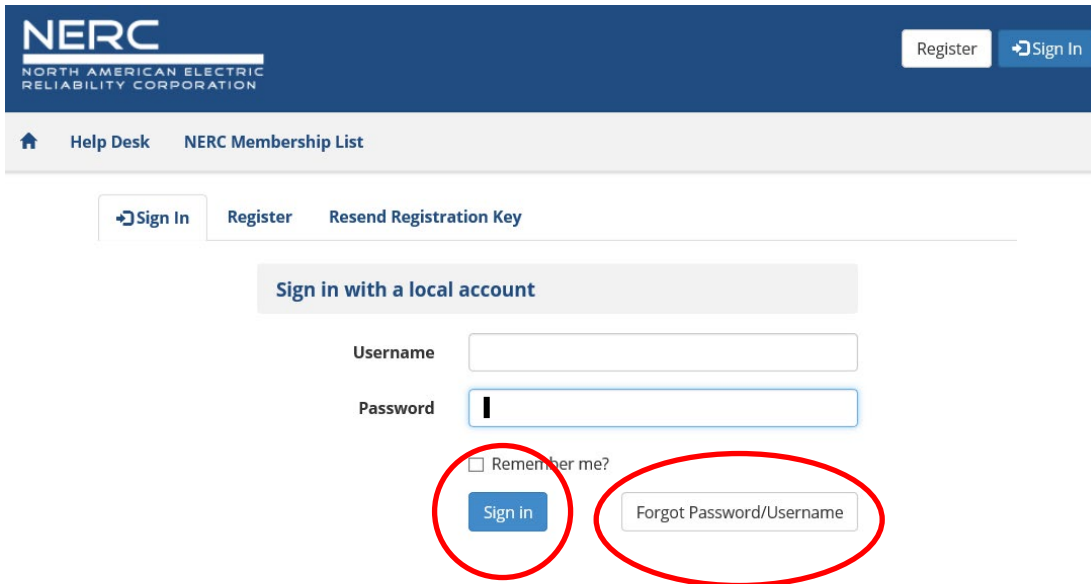
Chapter 2: First Login for ERO Portal User Access

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.

Forgot Password/Username

Email Address

Please enter your email address to continue.



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.

Please answer the following security questions to continue.

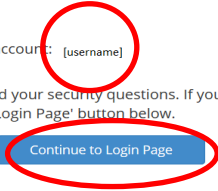
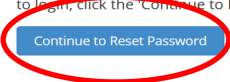
What was your childhood nickname?

What street did you live on in third grade?



Important! Username for this account: [username]

You have successfully answered your security questions. If you would like to reset your password, click the 'Continue to Reset Password' button below. If you would like to login, click the 'Continue to Login Page' button below.



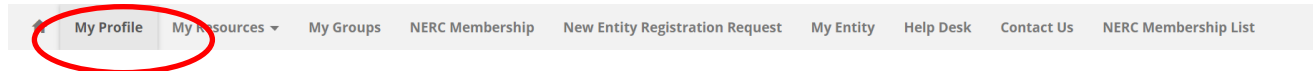
7. Click **Continue to Login Page** if the password is known.
8. To reset the password, click **Continue to Reset Password**.
9. Using the password criteria identified in section 4.2, enter and confirm the new password.
10. Click **Reset**.
11. Return to login page and enter username and password.
12.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

Request Access to Align

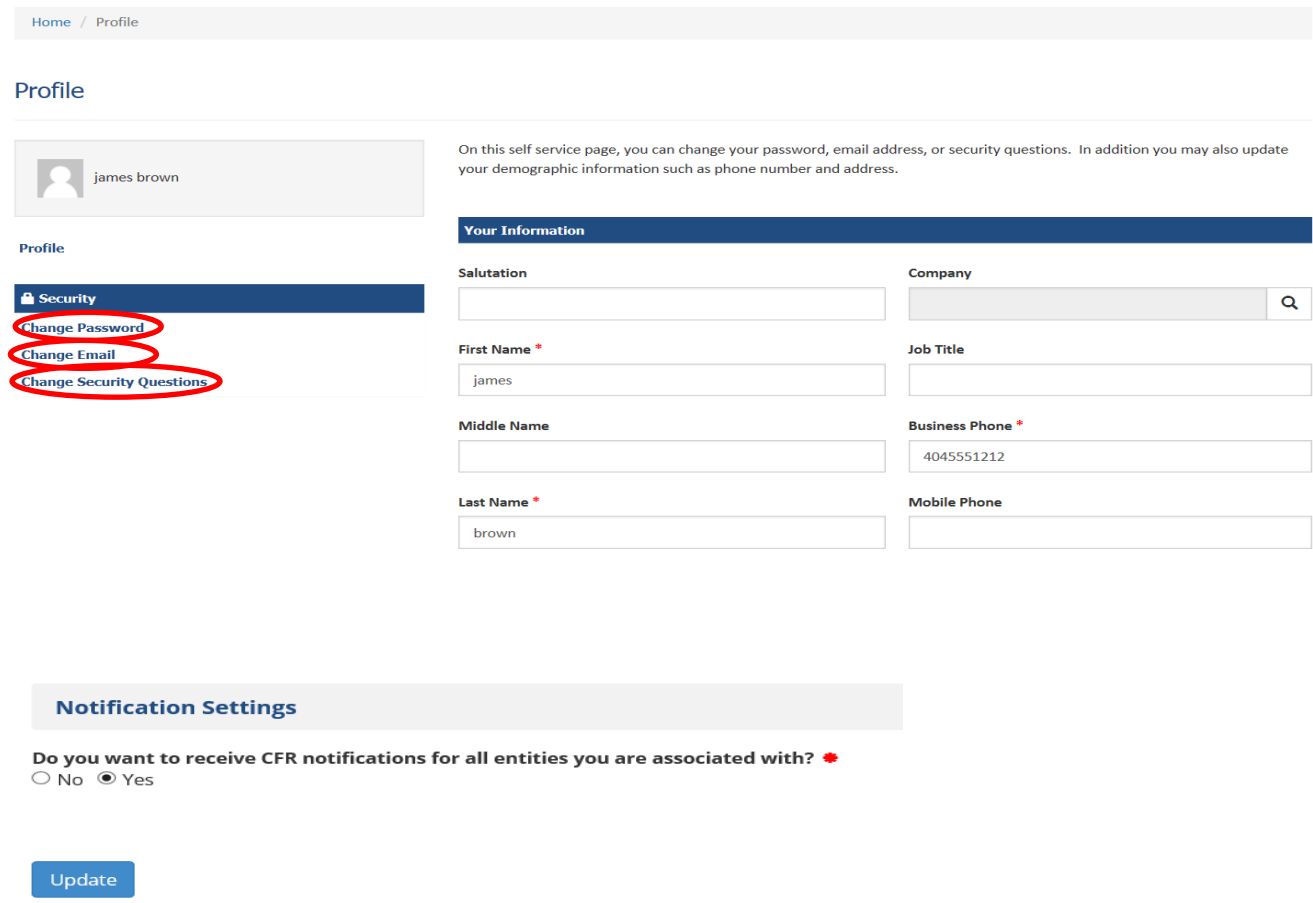
Chapter 3: ERO Portal Profile Management

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 Password

Username	<input type="text" value="jamesbrown"/>
Old Password	<input type="password"/>
	<p>Password Requirements:</p> <ul style="list-style-type: none"> Minimum of 8 characters long. Must Contain at least 1 number, 1 lowercase letter, 1 uppercase letter, and 1 special character (!,@,#,\$,%^,&,*)
New Password	<input type="password"/>
Confirm Password	<input type="password"/>
	<input type="button" value="Change Password"/>

Change Email

Users may change their 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 assistance.

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

Change Email

Email	<input type="text" value="victor.myers"/>	<input type="text" value="@nerc.net"/>
	<input type="button" value="✉ 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

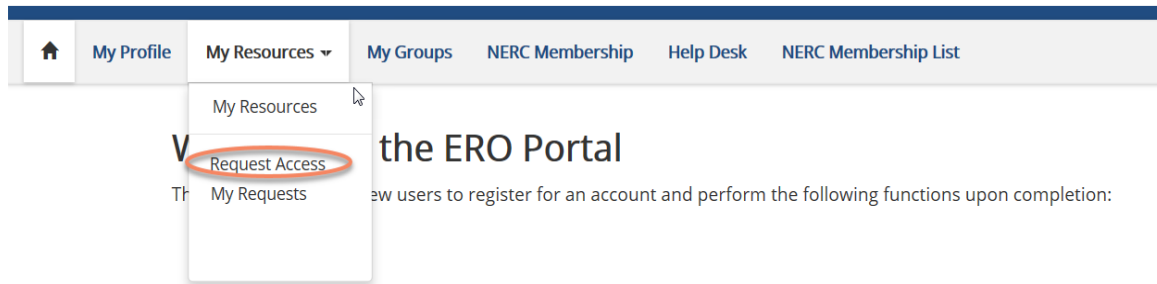
My Resources

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.

Access to Resources

Individuals can request access to the list of Resources listed in the ERO Portal.

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**.

Request Access

The page allows you to request access to resources such as datastores and applications.

Show entries

Search

Name	Description
2016 CMEP-ORCP CCC Audit Admins	This account was used to share files between NERC staff and third-party auditors as well as...
Audit Assurance - FRCC	Individuals interested in accessing any of NERC's secure web sites must first register for a N..
Balancing Authority Submittal - Admins	Used for submitting BA data for multiple purposes
Balancing Authority Submittal - ERO Enterprise Permissions	Balancing Authority Submittal - ERO Enterprise Permissions
Balancing Authority Submittal - Resources Subcommittee	Used for submitting BA data for multiple purposes

Showing 1 to 5 of 42 entries

Previous **1** 2 3 4 5 ... 9 Next

Next

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

General

Resource *
 ✕ 🔍

Manager Full Name

Manager Title

Manager Email

Manager Phone Number

Comments

Previous Next

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**.

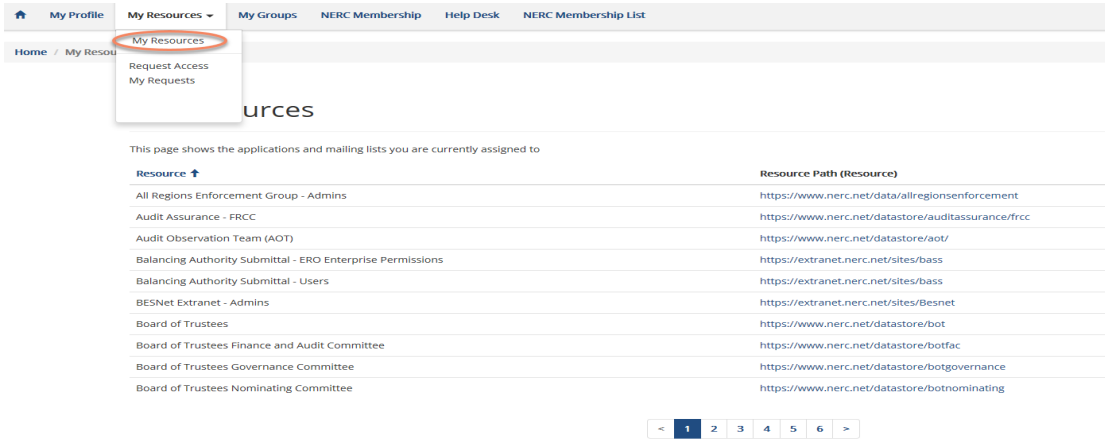
My Requests

This page shows the applications or mailing lists that you have requested access to

Resource	Request Date ↑	Status Reason
Test	9/20/2018 7:00 AM	Approved
MIDAS Portal	8/10/2018 9:02 PM	New
Balancing Authority Submittal - Users	12/6/2017 4:16 PM	
Audit Assurance - FRCC	11/16/2017 7:10 PM	
Area Interchange Error System	11/2/2017 6:18 PM	New
Standards Development Developers	8/22/2017 8:00 AM	Approved
Reliability Coordinator Information System (RCIS)	3/16/2017 7:14 PM	Rejected
ISN Data - WECC Data Definition File	3/10/2017 12:29 PM	Rejected
Compliance Folder	2/27/2017 4:12 PM	Rejected
Compliance CWI Web Folder	2/17/2017 4:12 PM	Rejected

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 Applications

Currently there are four applications identified being supported by the ERO portal.

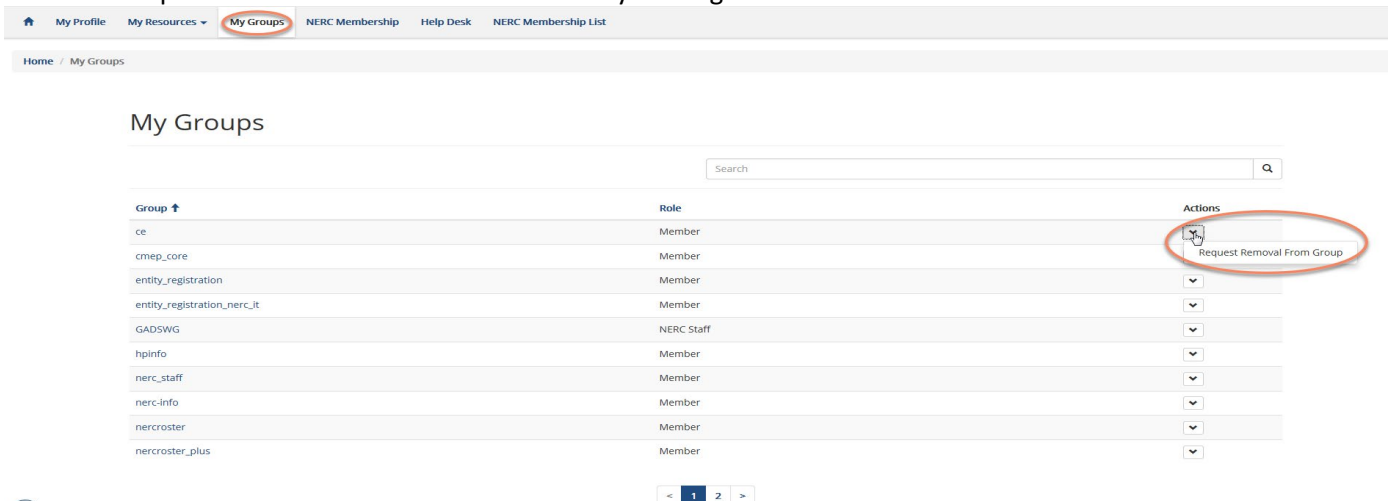
- Align
- CORES
- GMD
- MIDAS Portal

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 organization. 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.

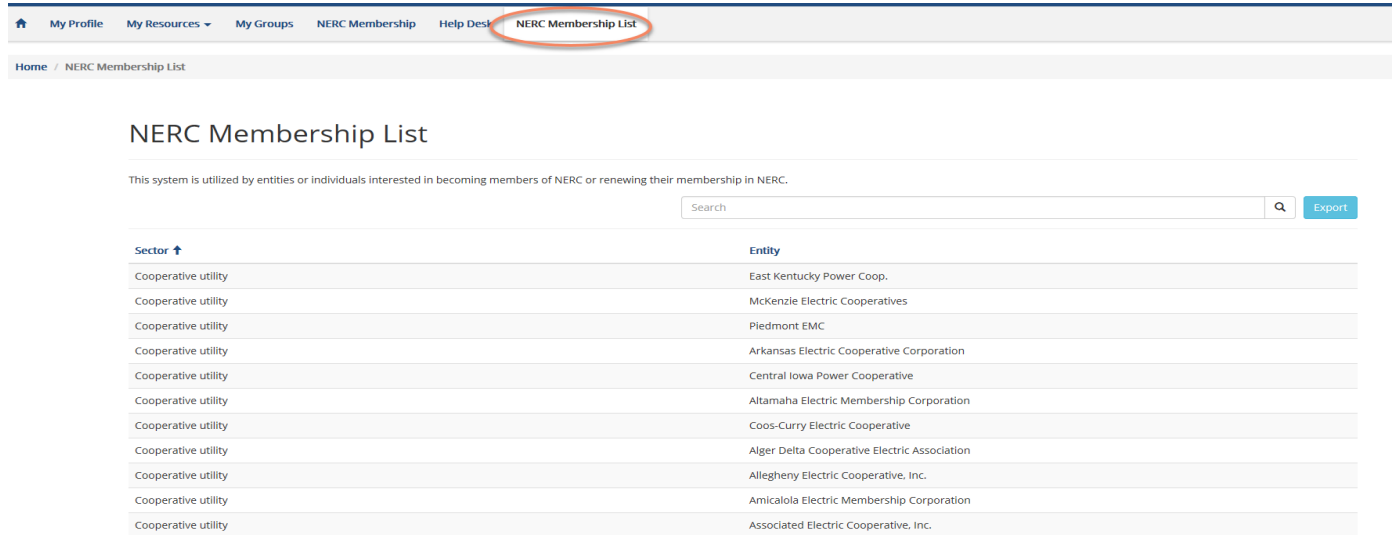
My Groups

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.



Home / NERC Membership List

NERC Membership List

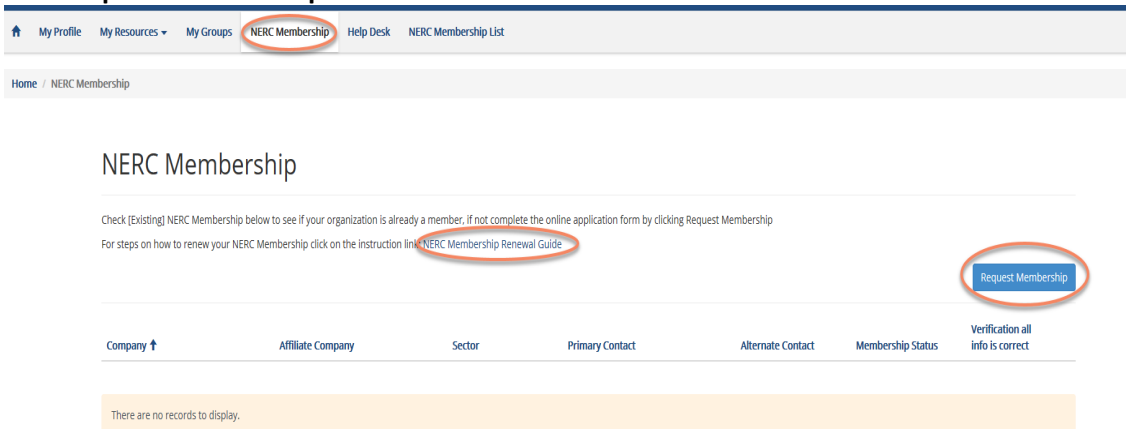
This system is utilized by entities or individuals interested in becoming members of NERC or renewing their membership in NERC.

Search

Sector ↑	Entity
Cooperative utility	East Kentucky Power Coop.
Cooperative utility	McKenzie Electric Cooperatives
Cooperative utility	Piedmont EMC
Cooperative utility	Arkansas Electric Cooperative Corporation
Cooperative utility	Central Iowa Power Cooperative
Cooperative utility	Altamaha Electric Membership Corporation
Cooperative utility	Coos-Curry Electric Cooperative
Cooperative utility	Alger Delta Cooperative Electric Association
Cooperative utility	Allegheny Electric Cooperative, Inc.
Cooperative utility	Amicalola Electric Membership Corporation
Cooperative utility	Associated Electric Cooperative, Inc.

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**.



Home / NERC Membership

NERC Membership

Check (Existing) NERC Membership below to see if your organization is already a member. If not complete the online application form by clicking Request Membership
For steps on how to renew your NERC Membership click on the instruction link [NERC Membership Renewal Guide](#)

Company ↑	Affiliate Company	Sector	Primary Contact	Alternate Contact	Membership Status	Verification all info is correct
There are no records to display.						

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

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

Option 1 – Applications

Any user may request rights for their organization from the Applications page.

1. Click **My Applications** on the upper toolbar
2. Click **Request Application Access**
3. Click **Create New Application Access Request**
4. Click **Select Entity** from the drop-down list
5. Click **Application Role**
6. **Submit**

Option 2 - Manage Entity Option

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

7. Click **My Profile** on the upper toolbar
8. Click **Manage Entity**

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Home / Profile

Profile

Russel Mountjoy

Profile

- Manage Entity

Security

- Change Password
- Change Email
- Change Security Questions

a. Grant permissions to new Entity User

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NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

Russel Mountjoy | test-2736c32f-5d91-4102-876f-190821e8a38f - Test-Minnes

Home / Manage Entity

Manage Entity

Entity Name	NERC Number
Test-Minnesota Lakes Light & Power	test-2736c32f-5d91-4102-876f-190821e8a38f

Entity Users

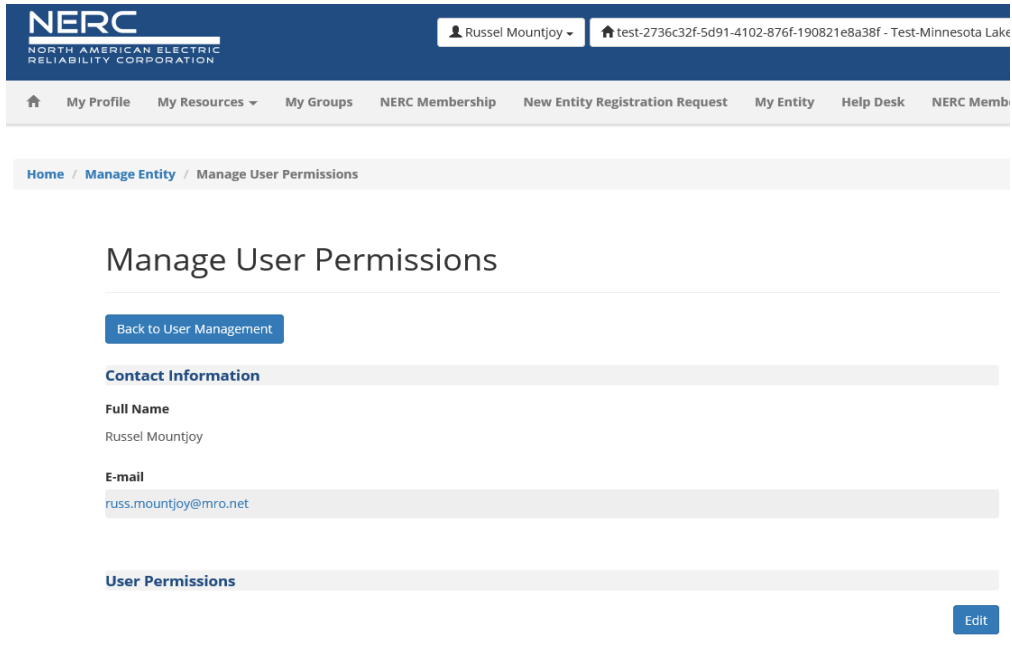
The following users are associated with this entity: [Add Contact](#)

User	City	State	Phone	E-mail Address	Action

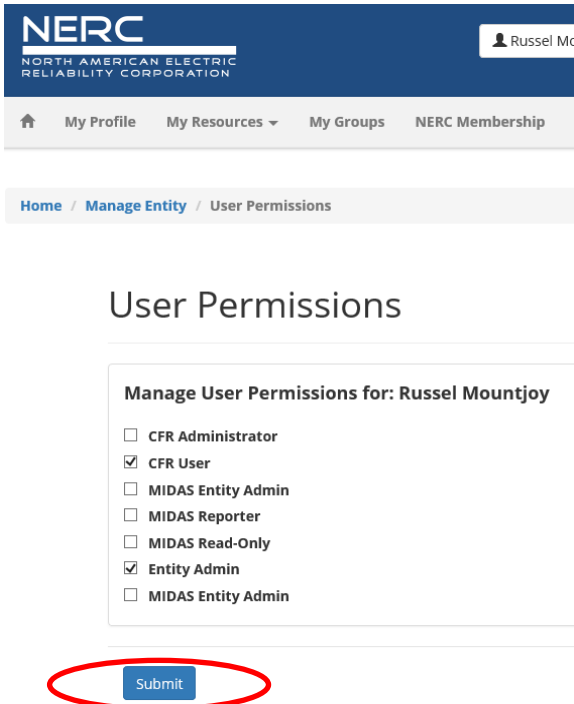
- i. Click **Add Contact**
- ii. Enter email address of user being granted permission

The screenshot shows the NERC (North American Electric Reliability Corporation) portal interface. At the top, there is a dark blue header with the NERC logo and navigation links: Home, My Profile, My Resources, My Groups, NERC Membership, New Entity Registration Request, and My Entity. Below the header is a breadcrumb trail: Home / Manage Entity / Add Contact to Entity. The main heading is 'Add Contact to Entity'. Below the heading is a text prompt: 'Enter the email address of the contact you are adding to your entity'. There is a text input field containing the letter 'I' and a blue 'Search Contacts' button. Below the input field is a blue 'Submit' button.

- 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**

NERC
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My Profile | My Resources | My Groups | NERC Membership | New Entity Registration Request | My Entity | Help Desk | NERC Membershi

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Entity Users

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User	City	State	Phone	E-mail Address	Action
Russel Mountjoy	St. Paul	MN		russ.mountjoy@mro.net	Remove User