

Texas RE Extranet Instructions

Texas RE provides a web-based secure site to facilitate the upload and download of certain information through an encrypted Transport Layer Security (TLS) session. If the ERO Enterprise Secure Evidence Locker is unavailable registered entities may be required to submit documents through the Texas RE Extranet. **Documents** will be deleted within three business days of the document upload date.

Logging in to Texas RE's Extranet

- Step 1: Using any web browser, navigate to https://docs.texasre.org
- Step 2: Enter your username and password. If this is your first time logging in, you will be prompted to update your password. (*Fig. 1*)
 - Must be at least 8 characters
 - Must have both uppercase and lowercase
 - Must have at least one number

Note: Account will be disabled after 10 invalid login attempts.

Step 3: Select how you would like to receive the two-step verification code (*Fig. 2*): via email (*Fig. 3*) or text message (*Fig. 4*), and enter the address or number.



Figure 3: Email verification

Step 4: On the Extranet home page, enter the verification code you received. (*Fig. 5*)



Figure 1: Texas RE Extranet login page



Figure 2: Select verification code delivery



Figure 4: Text verification



Figure 5: Enter verification code



Using the Texas RE Extranet

Once successfully logged in, you will be directed to the Extranet landing page (Fig. 6).

| Texas Reliability Entity, Inc. | |
|---|---|
| | |
| Fisuring electric reliability for liceans | Texas Reliability Entity's CMEP Document Site 🛛 |
| Home | This site has been created to facilitate the transfer of documents between Texas RE and your Entity for CMEP Engagements. Below you will find a list of your CMEP Engagements with Texas RE. Each Engagement Folder contains a FromTexasRE folder and a ToTexasRE folder. • In the FromTexasRE folder, you will find the documents Texas RE has provided you for the engagement. • In the ToTexasRE folder, you can submit documents to Texas RE for your engagement. NERC Compliance Documents |



Your landing page is populated with folders for each activity being conducted with Texas RE. Some entities have more than one activity.

The upload and download of information takes place in the *FromTexasRE* and *ToTexasRE* subfolders within the selected activity (*Fig. 7*):

| Texas Reliability Entity, Inc. | | |
|--------------------------------|--|------------------|
| BROWSE FILES LIBRARY | | |
| | Texas RE Extranet Home CMEP Documents + TEST | |
| Home CMEP Documents | Activity View Edit View Find a file 🔎 | Item Child Count |
| | FromTexasRE Contains documents sent from Texas RE to the Registered Entity. | б |
| | ToTexasRE Contains the documents submitted to Texas RE by the Registered Entity. | 0 |

Figure 7: Sub-folders inside selected activity

Capabilities within each sub-folder vary:

| | FromTexasRE | ToTexasRE |
|----------------------------|--------------|--------------|
| Upload files. | Х | \checkmark |
| View and download content. | \checkmark | \checkmark |

The following specifications apply for Extranet submissions. Any submissions not adhering to these specifications may require resubmittal in a different manner. Documents will be deleted within three business days of the document upload date. You may request to have documents deleted by selecting the ellipses next to the file name, and selecting Request Delete.

- The maximum single file upload size is 250 MB.
- Larger batches of files may not upload completely. Please submit files in smaller batches.
- Do not provide zip files.



- Do not provide files with embedded flash due to security concerns. Embedding files within other files is not recommended.
- Do not create sub-folders.
- 255-character maximum limit for a document title.
- Special characters in document titles are not accepted (& ~ # % + []/: <> ? | ").

Submitting Documents: Risk, Registration, Certification, and Enforcement Activities

- From your landing page (*Fig. 8*), select the appropriate activity folder for the document(s) being submitted.
- Click the *ToTexasRE* sub-folder (*Fig. 9*).

| Texas Reliability Entity, Inc. | |
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| | Texas RE Extranet Log Out |
| Drawing electric reliability for leaves | Texas Reliability Entity's CMEP Document Site 🛛 |
| 11 | |
| Home | This site has been created to facilitate the transfer of documents between Texas RE and your Entity for CMEP Engagements. |
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| | NERC Compliance Documents |

Figure 8: Extranet landing page



Figure 9: Sub-folders inside selected activity

• From your local source folder, select the document(s) to be moved into the Extranet (*Fig. 10*).



| File Home Si | hare View | | | |
|----------------|--------------------------------|------------------|------------------|-------|
| ← → * ↑ | This PC > Desktop > temp files | | | |
| 🛃 Quick access | Name | Date modified | Туре | Size |
| M Quick access | Test 1 | 1/9/2018 2:34 PM | Microsoft Word D | 12 KB |
| OneDrive | Test 2 | 1/9/2018 2:34 PM | Microsoft Word D | 12 KB |
| This PC | Test 3 | 1/9/2018 2:35 PM | Microsoft Word D | 12 KB |
| | Test 4 | 1/9/2018 2:35 PM | Microsoft Word D | 12 KB |

Figure 10: Sample source file in Windows Explorer

Drag and drop the • selected documents to the *ToTexasRE* sub-folder (Fig. 11).



Figure 11: Drag and drop files



Submitting Documents: Engagement Activities

Only used in the event the ERO Enterprise Secure Evidence Locker (SEL) is unavailable, and direction is provided by Texas RE staff.

- On your landing page (Fig. 12), select the appropriate activity folder for the document(s) being submitted.
- Click the ToTexasRE sub-folder (Fig. 13). •

| Texas Reliability Entity, Inc. | |
|--------------------------------|---|
| | |
| TEXASRE | Texas Reliability Entity's CMEP Document Site $_{\odot}$ |
| Home | This site has been created to facilitate the transfer of documents between Texas RE and your Entity for CIMEP Engagements. |
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| | In the FromTexasRE folder, you will find the documents Texas RE has provided you for the engagement. In the ToTexasRE folder, you can submit documents to Texas RE for your engagement. |
| | NERC Compliance Documents |
| Figure 12: Ex | xtranet landing page |

| TEXAS RE | CMEP Documents - TEST | | |
|-----------------|--|------------------|-------------------|
| Home | Activity View AdminSupportView Edit View Find a file O | | |
| CMEP Documents | V D Name Description | Item Child Count | Modified |
| | FromTexasRE Contains documents sent from Texas RE to the Registered Entity. | 6 | 1/8/2018 10:21 AN |
| | 🗸 🍵 ToTexasRE 🛛 📖 Contains the documents submitted to Texas RE by the Registered Entity. | 0 | 1/8/2018 10:21 AM |

Figure 13: Sub-folders inside selected activity

- Inside the *ToTexasRE* sub-folder, there are two sub-folders (*Fig. 14*):
 - Evidence: Contains sub-folder(s) for the NERC Standard(s) and Requirement(s) 0 included in the scope of the engagement.
 - RSAWs: Houses all RSAW documents completed by the registered entity. Please 0 do not submit RSAW documents as PDFs.

Note: The entity can upload the same file multiple times within a sub-folder. A separate version of the file will be kept for each upload.

Based on the evidence submitted, upload to either the Evidence or RSAWs sub-folder. •

| Ð | new | documer | nt or drag files here |
|------|-------|----------|-----------------------|
| Docu | ument | View | Find a file |
| ~ | Ď | Name | Additional Comments |
| | | Evidence | ••• |
| | | RSAWs | ••• |
| | | | |

All RSAW documents can be uploaded directly in the RSAWs sub-folder. The RSAWs sub-folder

Figure 14: Evidence and RSAWs folders



does not contain sub-folders.

Uploading Files Applicable to Multiple NERC Standards and Requirements

There are two options to upload documents that are applicable to more than one Standard and Requirement.

- <u>Option 1</u>: Documents can be uploaded to each applicable Standard and Requirement subfolder.
- <u>Option 2</u>: Documents can be uploaded in the *ToTexasRE* sub-folder with additional comments to indicate the applicable Standards and Requirements.

Evidence Sub-folder

To upload evidence, follow the steps below using this *example*: Upload evidence for the applicable NERC Standard and Requirement PRC-004-5(i), R1.

• Click on the PRC-004-5(i) R1 sub-folder (*Fig. 15*).



Figure 15: Example - Select PRC-005(i) R1

Inside, you will see "new document or drag files here" to upload individual or multiple documents for PRC-004-5(i) R1 (*Fig. 16*).

Evidence can be dragged and dropped directly into the appropriate sub-folder.

- Select the evidence you wish to upload from your local source folder and drag it until it is hovering inside the R1 Extranet sub-folder (*Fig. 16*). A blue area will be highlighted to indicate the correct area to drop the files.
- Drop the PRC-004-5(i) R1 evidence into the box. Multiple documents may be uploaded with a single drag and drop.

| Texas RE Extranet Log Out Evidence > PRC-004-5(i) R1 |
|---|
| ew document or drag files here Requirement Activity Viters Document View ··· Find a file D Name Applicable Standards/Requirement: Additional Comments Mod There are no files in the view "Requirement". |

Figure 16: Example - Drag and drop evidence

Utilize this process to migrate all evidence into the applicable Requirement sub-folders. This **example** is based on PRC-004-5(i) R1, but the process is applicable for uploading evidence across all Standards and Requirements.



RSAWs Sub-folder

The RSAWs sub-folder will house all RSAW documents completed by the registered entity. **Please do not submit RSAW documents as PDFs.**

• Select the RSAWs sub-folder (Fig. 17).

| ÷ | new | docume | <mark>nt</mark> or | drag files l |
|------|-------|----------|--------------------|----------------|
| Docu | ument | View | Find | a file |
| ~ | Ľ | Name | | Additional Com |
| | | Evidence | ••• | |
| | | RSAWs 🚽 | | |
| | 47.0 | | | |

Figure 17: RSAWs folder

Documents can be dragged and dropped directly into the appropriate sub-folder.

- Select the documents you wish to upload and drag them into the "new document" section (*Fig. 18*). A blue area will be highlighted to indicate the correct area to drop the files.
- Drop the documents into the sub-folder.
- Multiple documents may be uploaded with a single drag and drop.

Utilize this process to migrate all RSAWs.

| ToTexasRE → RSAWs |
|---|
| new document or drag files here Requirement Activity View Document View Find a file |
| ✓ ☐ Name Applicable Standards/Requirements Additional Comments There are no files in the view "Requirement". |
| Figure 18: Drag and drop RSAWs |



Individual engagement document uploads which are neither Evidence nor RSAWs

Texas RE requests registered entities provide a brief comment (255-character maximum) for each individual document uploaded to provide context for the engagement team.

- On your landing page, select the appropriate activity folder for the document(s) being submitted (*Fig. 19*).
- Click the *ToTexasRE* sub-folder (*Fig. 20*).

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|--------------------------------|--|
| | |
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| | NERC Compliance Documents |
| Figure 19: Ex | xtranet landing page |



Figure 20: Select ToTexasRE folder

Documents can be dragged and dropped directly into the *ToTexasRE* sub-folder.

• From your source folder, select the documents you wish to upload. (Fig. 21).

| File Home Share | View | | | |
|------------------|---------------------------|------------------|------------------|-------|
| ← → × ↑ 📙 > This | PC > Desktop > temp files | | | |
| 🔹 Quick access | Name | Date modified | Туре | Size |
| A dates access | 📹 Test 1 | 1/9/2018 2:34 PM | Microsoft Word D | 12 KB |
| OneDrive | 📲 Test 2 | 1/9/2018 2:34 PM | Microsoft Word D | 12 KB |
| This PC | Test 3 | 1/9/2018 2:35 PM | Microsoft Word D | 12 KB |
| | Test 4 | 1/9/2018 2:35 PM | Microsoft Word D | 12 KB |
| | | | | |



• Drag the documents into the "new document" section in the *ToTexasRE* subfolder. A blue area will be highlighted to indicate the correct area to drop the files. Multiple documents may be uploaded with a single drag and drop.

| BROWSE FILES LIBRARY | | | | | | | |
|------------------------|---|--|----------------------|--|-----------------|--------------------------------|--|
| TEXAS RE | TEST - ToTexasRE | | | | 1 | Drag and drop | |
| Home CMEP Ecouments | new document or drag files he Document View Finds file ' D Nove Antition/Converts Variate There are no files in the view 'Document' Texas Reliability Enshy, Inc. | ere Nother by Ves View". | in fileSte | | | | |
| | | Texas RE Extranet | ToTexasRE | | | | |
| | Home CMEP Documents | Upload complet Document View | ed (4 added) DISMISS | Q | | | |
| | | D Name | Additional Comm | ents Modified 8/5/2019 11:15 AM | Modified By | Version File Size 1.0 20 KB | |
| | | Test 2 Test 3 | | 8/5/2019 11:15 AM 8/5/2019 11:15 AM | Kasper, Mishani | 1.0 20 KB | |
| | | Test d | | 8/5/2019 11:15 AM | Kasner Mithani | 1.0 20.68 | |

Figure 22: Drag and drop files



After uploading the documents, populate the Additional Comments section for each document.

• Select the ellipses to the right of the document name (Fig. 23).



Figure 23: Select ellipses to access options

- Select the ellipses again on the pop-up screen that appears.
- Select Edit Properties from the menu options that appear (*Fig. 24*).

| Test 1.docx | × |
|------------------------------|-------------------------|
| | v |
| | vishani 1 |
| https://docs.texasre.org/CME | P1/TEST/ToTex Vishani 1 |
| | Mishani 1 |
| EDIT SHARE FOLLOW | ···· dishani 1 |
| | Request Delete |
| | View Properties |
| | Edit Properties |

Figure 24: Selecting "Edit Properties"

| MEP Docu | iments - texa | sre.jpg | | |
|-------------|---------------|----------------------|---|--|
| | | | | |
| EDIT | | | | |
| — × | - Ab Cut | \mathbf{X} | | |
| Save Cancel | Paste | Delete | | |
| Commit | Clipboard | Actions | | |
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| | | The document v | vas uploaded successfully. Use this form to | o update the properties of the documen |
| | | Norma * | | |
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| | | Additional Comment | s | |
| | | | | |
| | | | | |
| | | | | |
| | | Version: 1.0 | | |
| | | | | Save Cance |

- The Name field will be auto-populated with the document name. Enter Additional Comments in the Additional Comments field (*Fig. 25*).
- Choose Save to close.

Figure 25: Adding additional comments

Please contact Texas RE at <u>Extranet@texasre.org</u> with any questions about using the Extranet and/or to change who from your entity may access the Texas RE Extranet.