Welcome to Align Release 2 Training

Periodic Data Submittals and ERO Secure Evidence Locker

Penny Kerr, Senior Compliance Analyst

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Antitrust Admonition

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Sli.do

slido   Product   Solutions   Pricing   Resources   Enterprise   Log In   **Sign Up**

TXRE

Joining as a participant?

Enter event code

Join an existing event

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Agenda

Introduction to Align and ERO SEL

Access and Permission Roles

Process Periodic Data Submittal (PDS) Request

PDS Notifications

NERC HelpDesk/FootPrints Tickets

ERO SEL Functionality

Resources, Stay Informed, and Training

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What is Align?

An ERO Enterprise common platform developed to support compliance monitoring and enforcement (CMEP) activities and business processes.

The tool provides a standardized and consistent interface for entities conducting CMEP activities.

The Align rollout consists of three releases with full implementation by the end of 2021.

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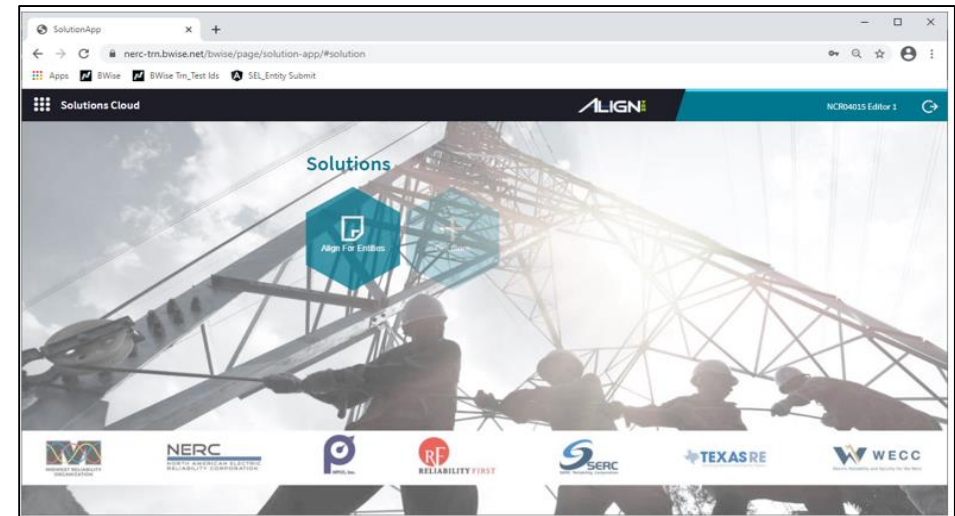
What is the ERO SEL?

ERO Secure Evidence Locker (ERO SEL)

A highly secure, isolated, encrypted environment. It acts as a temporary repository to upload evidence which is subject to file destruction policies.

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Align Release 2 and ERO SEL Go Live

Periodic Data Submittals

Self-Certifications

July 19, 2021

Technical Feasibility
Exceptions

ERO Secure Evidence Locker

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What will I start doing on July 19, 2021?

<div style="background-color: green;">

START on July 19, 2021

</div>

Align Release 2:

- Enter Technical Feasibility Exceptions (TFEs)

- Process Periodic Data Submittals (PDS)

- Process Self-Certifications

- Submit Attestations

- PCC required to manage user access for Align

- Submit evidence to the ERO SEL as needed

What will I need start doing on August 2, 2021?

Start on 8/2/2021 – 9/3/2021: Q2 2021 PDS FAC-003-4

Align Release 2:

- Process PDS FAC-003-4

- Adjusted timeframe to accommodate Align implementation

- Future PDS in Align and will occur on the normal submittal schedule

- Submit evidence in ERO SEL, if needed.

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What will I stop doing on July 19, 2021?

STOP on July 19, 2021

CDMS:
- TFEs
- PDS
- Texas RE Extranet:
  - Evidence submittals for new TFE, PDS, and Self-Certifications

Note: PCCs should continue to work with Texas RE Team Leads regarding current engagement evidence submittals underway.

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What will I continue to do on July 19, 2021?

Continue on July 19, 2021

- Maintain contact information in CDMS and CORES
- Continue to submit evidence to the Extranet for engagements currently in progress
- For currently open Self Certs Texas RE will continue normal process through Extranet

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Access and Permission Roles

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Access for Align and ERO SEL: ERO Portal Required

The Primary Compliance Contact (PCC) MUST have an ERO Portal Account ([Registered Entities: User Access Guide](#)**)**

- **Set up ERO Portal Account:**
  - Navigate to 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.
  - Select "Sign In" in the upper left-hand corner.
  - Enter your credentials to confirm access to ERO Portal.

NOTE: Submitter Access changes may take up to 24 hours to take effect!

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Align Release 2 PDS and SEL Training
July 14 and 16, 2021

Permission Roles: Align

PCC grants 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 items to the CEA for review or processing.

Registered Entity Accounts

Access Request

- Registered entity user requests access level to Align

Access Approval

- Registered entity PCC reviews and approves access request

Access Verification

- Registered entity user verifies access. **Note**: Access changes take effect the next day.

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Permission Roles: ERO SEL

- **ERO SEL Submitter Role**
- **Current State**
  - All PCCs and Align Submitter roles have been provided ERO SEL Submitter role
  - In the event PCC changes, the new designated PCC will be provided ERO SEL Submitter role access
  - To gain ERO SEL access, submit ticket to NERC's HelpDesk/FootPrints (https://support.nerc.net/)
    - Routed to Texas RE staff
    - Texas RE staff will confirm with PCC user's request
    - Escalate to NERC to enable SEL Submitter role
- **Future State**
  - PCC will approve their staff's request for access to the ERO SEL

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Slido Question

When does Release 2 go live in the Texas RE region?

A. August 2, 2021
B. September 3, 2021
C. July 19, 2021
D. None of the above

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Periodic Data Submittals

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Agenda

PDS Schedule

Respond to a PDS request

- Answer qualifying questions in response to a Region PDS request
- Attest a PDS
- Request a due date extension
- Submit a PDS response

Provide an event-driven (ad-hoc) data submittal

PDS notifications

Attestations

- Active
- Attestations in Review
- Attestations to Reaffirm
- Inactive Attestations

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PDS Schedule

Align FAC-003-4 Q2 2021

Request for FAC-003-4 available on 8/2/2021 – 9/3/2021
- Align notification will be sent to PCC and ACC

Align FAC-003-4 Q3 and Q4 2021

Q3 2021: Available on 10/1/2021 – 10/20/2021

Q4 2021: Available on 1/1/2022 – 1/20/2022

Align PRC-023 2022 – Annually

Annual 2022: 3/1/2022 – 3/31/2022

TEXAS RE
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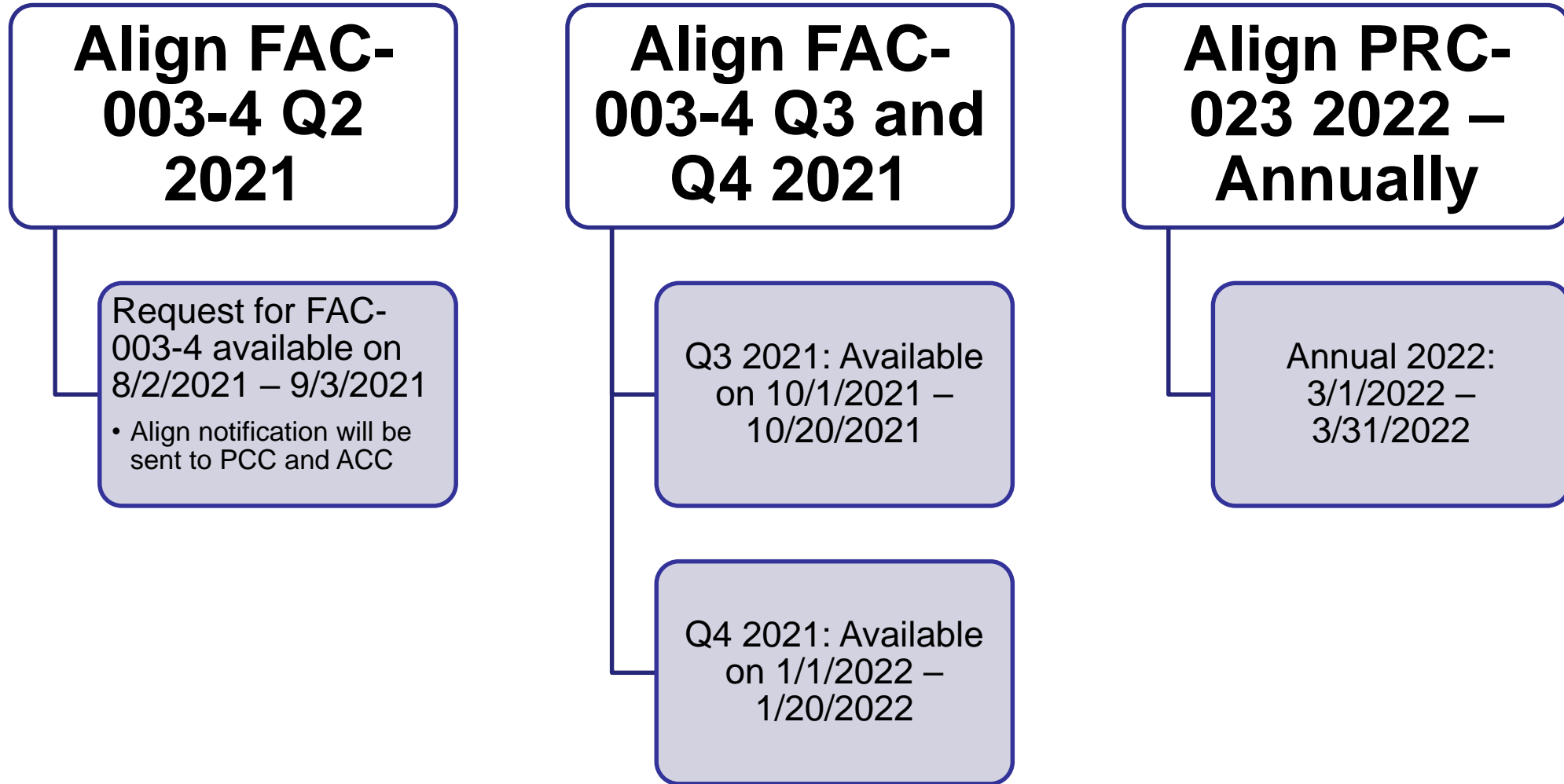
Align Versus CDMS

Align PDS	CDMS PDS
PDS qualifying questions are housed in Align. Align processes will prompt necessary PDS ERO SEL uploads.	Upload a spreadsheet for each submittal response.
Attestation created in Align. Annual attestations for PDS.	An attestation required a spreadsheet attestation upload. One-time attestation request.
Extension request functionality in Align.	PDS extension requests by email.
Ability to create and submit event driven data submittals.	Region initiates PDS request.
Multi-Region Registered Entities and Coordinated Oversight entities can access and view all their registrations for PDS from one common tool.	Requires a separate log in for each Region's registered entity(s).

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NEW PDS - Notification for Entity Response

FAC-003-4: Request Quarterly for GO and TO registrations

PRC-023-4: Request Annually for DP, GO, and TO registrations

Wed 7/7/2021 10:31 AM

N noreply@bwise.net

Action Required: A new Periodic Data Submittal (PDS2021-002426) has been requested by MRO.

AlignR2Testing@nerc.com

etention Policy   Texas RE Retention Policy - Default (6 months)   Expires   1/3/2022

WARNING: EXTERNAL SENDER. Always be cautious when clicking links or opening attachments. NEVER provide your user ID or password.

ALIGN   Automatic email alert   ERO Portal log in

Dear CourtneyVetter,

MRO has requested you to complete the following Periodic Data Submittal PDS2021-002426.

Please log in the Align and upload the relevant documentation.

Title: 7/7 Entity created PDS

ID: PDS2021-002426

Registration: Registration58174

Due Date: null

TEXAS RE
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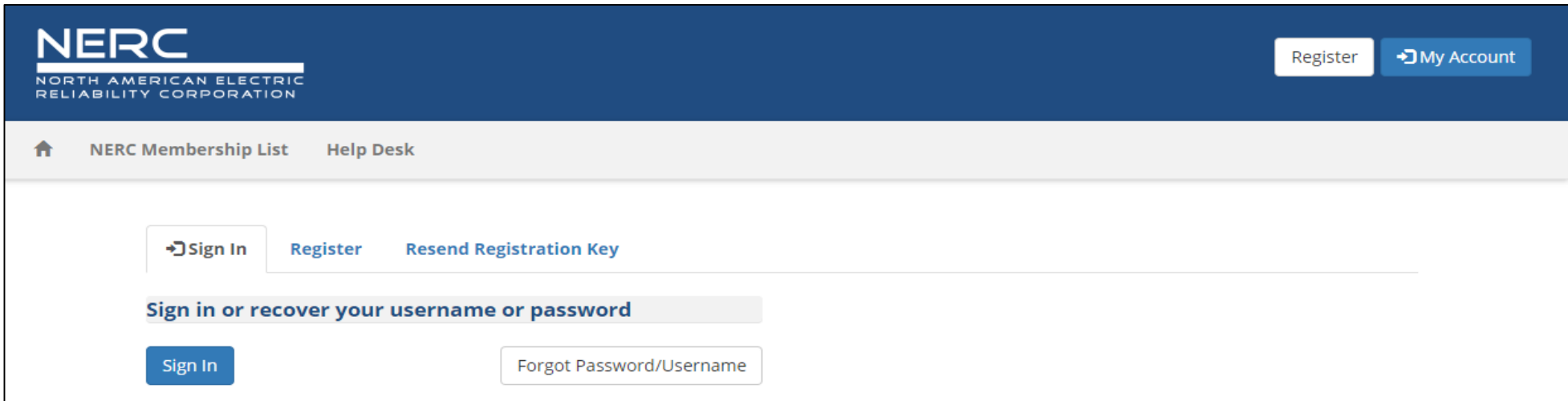
Log into Align

ERO Portal log in

- https://eroportal.nerc.net > My Account

Reset password or retrieve username

Help Desk ticket

Align Landing Page
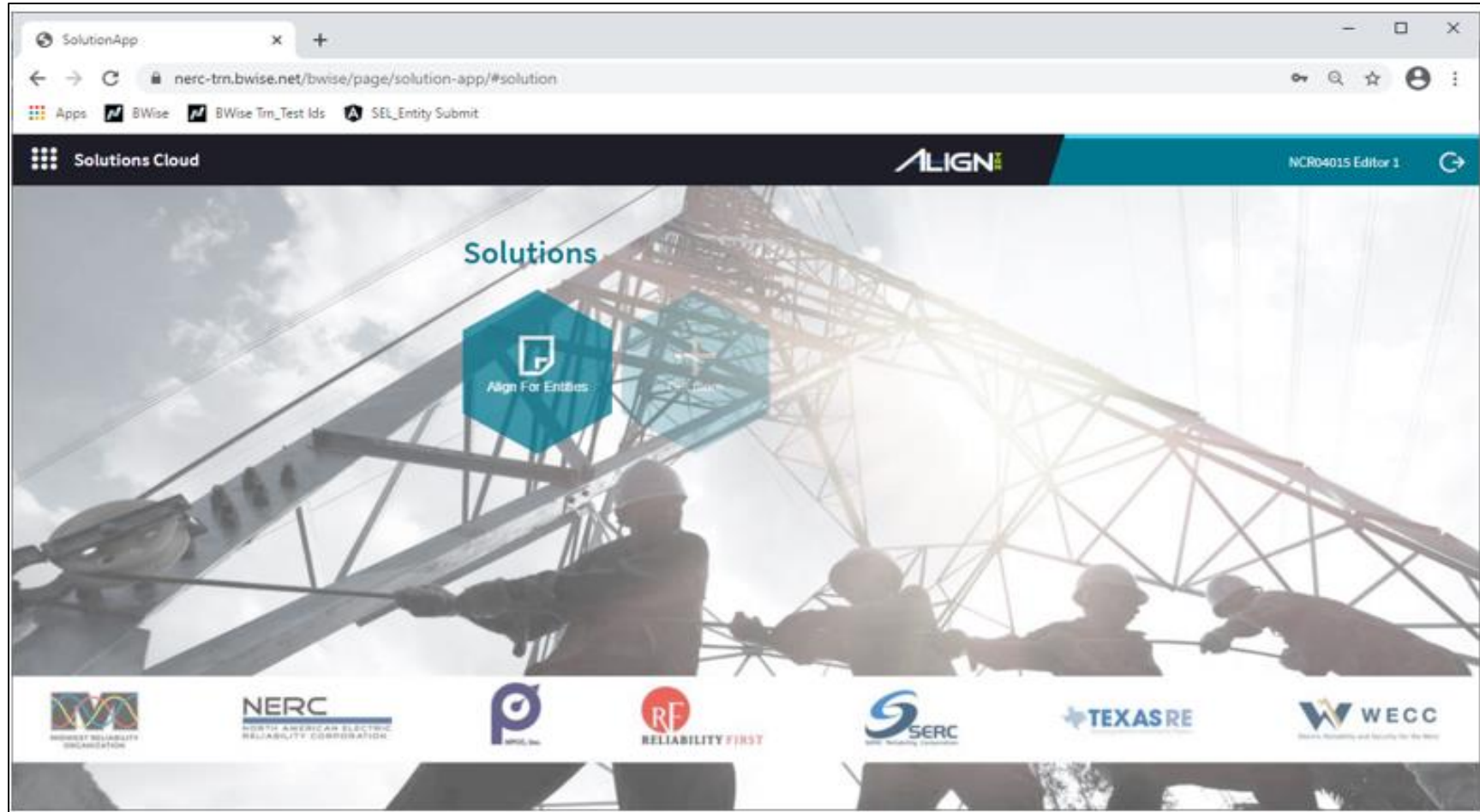
Align PDS

My Align

Navigate to Periodic Data Submittals

My Align
- My Align
- Self Reports and Logs
- Periodic Data Submittals ←
- Self Certifications
- Enforcement Processing
- Mitigation Management
- Technical Feasibility Exception
- Attestations
- Reports
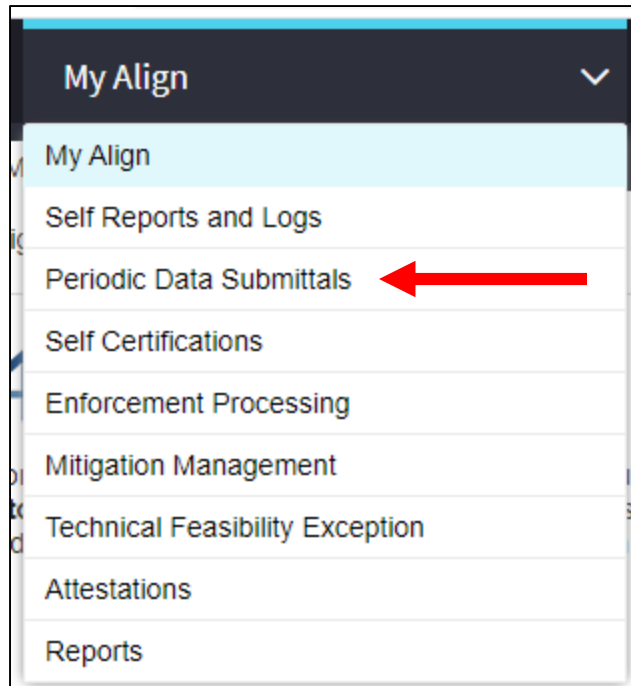
Navigate to Active PDS Requests tab

Periodic Data Submittals

| Active PDS Requests | PDS Submittals | Completed PDS Requests | Create PDS |

ACTIVE PDS REQUESTS AWAITING MY RESPONSE

| PDS ID | TYPE | REPORTING PERIOD | ENTITY |
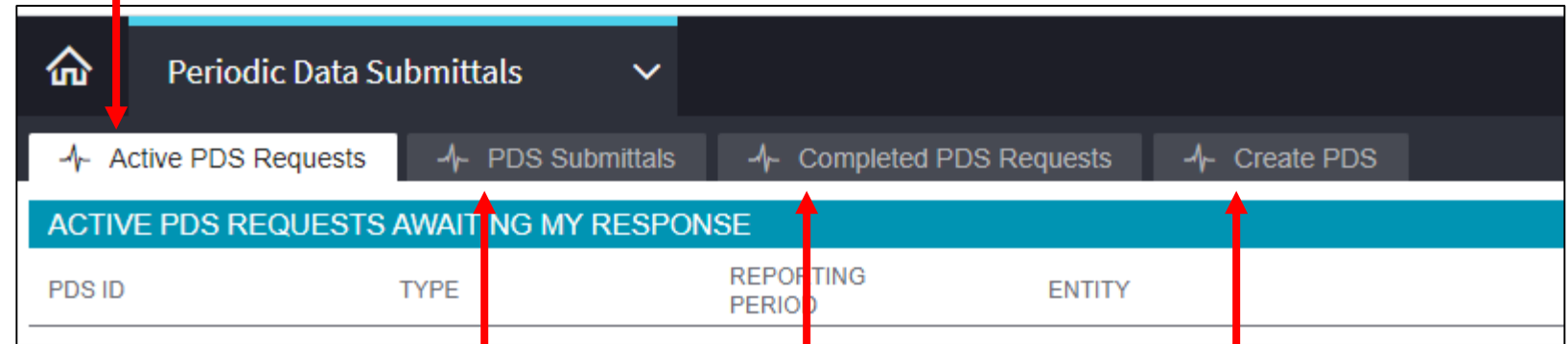
PDS Submittals in Region review

PDS Submittals which have completed Region review

Create event driven PDS

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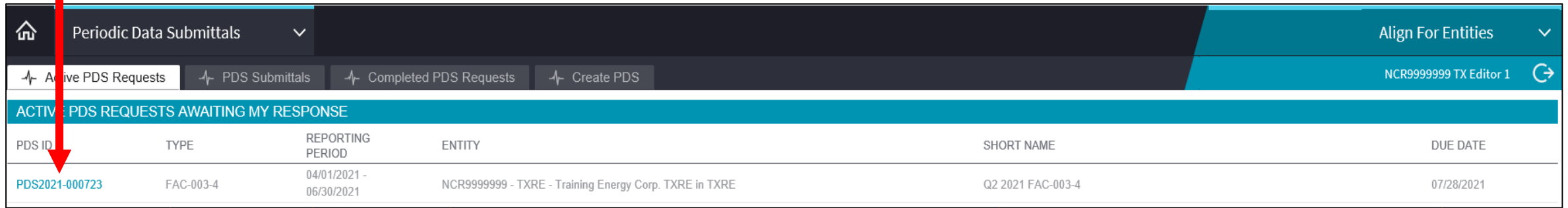
Respond to a PDS Request

Click the PDS ID hyperlink to respond to the PDS

Hyperlinks appear in blue-green

All column headings can be used for filtering

⌂	Periodic Data Submittals ⌄					Align For Entities ⌄
⌁ Active PDS Requests	⌁ PDS Submittals	⌁ Completed PDS Requests	⌁ Create PDS			NCR9999999 TX Editor 1 ⇥

ACTIVE PDS REQUESTS AWAITING MY RESPONSE

PDS ID	TYPE	REPORTING PERIOD	ENTITY	SHORT NAME	DUE DATE
PDS2021-000723	FAC-003-4	04/01/2021 - 06/30/2021	NCR9999999 - TXRE - Training Energy Corp. TXRE in TXRE	Q2 2021 FAC-003-4	07/28/2021

PDS Standard

Reporting period for the PDS request.

Entity NCR and Registered entity name

PDS title

Due date

Align Release 2 PDS and SEL Training
July 14 and 16, 2021

Slido Question

What color are hyperlinks in Align?

A. Burnt orange
B. Blue-green
C. Hot pink
D. Lime green

Respond to a PDS Request

Choose hyperlink to answer PDS qualifying questions

Q2 2021 FAC-003-4

General

Unique ID	PDS2021-000723
PDS for	FAC-003-4
Registration	NCR9999999 - TXRE - Training Energy Corp. TXRE in TXRE
PDS Name	Q2 2021 FAC-003-4
Description of Request	All vegetation related outages for the quarter, including category 1 and 2 outages previously reported (via the 48-hour report) and any category 3 outages shall be reported via webCDMS and the FAC-003-4 Texas RE Quarterly Data Submittal Form. This form is located in webCDMS under Compliance>Document Download section. FAC-003-4 quarterly reporting is due on the 20th of the month for the preceding quarter. To accommodate the attestation process moving forward, Texas RE requires an annual attestation form from all registered entities which do not own FAC-003-4 applicable Facilities. Once an attestation is received by Texas RE, these registered entities will not receive data submittal requests for FAC-003-4 unless warranted by facts and circumstances. If the registered entity would like to submit an annual attestation for the FAC-003-4 data submittal, please, complete the Attestation located in the Align Periodic Data Submittal, and submit. If conditions change that impact the registered entity's applicability to FAC-003-4, it is expected that the registered entity notify Texas RE (compliance@texasre.org) of the change to begin quarterly reporting for the first quarter in which the conditions changed. If you have questions, please contact compliance@texasre.org.
Submit on or after	July 7, 2021
But no later than	July 28, 2021

Region/LRE   TXRE   ← Region requesting the PDS

Monitoring Period Start   April 1, 2021
Monitoring Period End   June 30, 2021   → Reporting period for this specific PDS

Due dates

Specific PDS information

Questions

Instructions	Open the questions to the right and answer each question. Need more time? Scroll down to Request an Extension. Have evidence to upload? Scroll down to the Evidence section.

QUESTIONS

ACTION

NEW

Questions related to FAC-003-4 VERSION for NCR9999999 TX Editor 1

Hyperlink to qualifying questions

Update   Close

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Respond to a PDS Request

Is the Standard Applicable?

PDS2021-000723 - NCR9999999 - TXRE - Training Energy Corp. TXRE in TXRE - FAC-003-4 - NCR9999999 TX Editor 1

Transmission Vegetation Management

As an applicable Transmission Owner or applicable Generation Owner, is ⁎ FAC-003 applicable to your Facility(ies)?

> Yes
>
> No

If FAC-003 is not applicable to your Facility(ies), please **save** (finalize) your respons Attestation to that fact on the previous screen prior to submitting your response back

By clicking Save as Draft, you will have the ability to save your progress and come back and revise these responses prior to submittal. When you click Save, your responses will be finalized, and no further changes will be allowed.

Please note that prior to submitting your responses, you must finalize them as described above.

Save   Save Draft   Close

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Respond to a PDS Request

Standard is Applicable

PDS2021-000723 - NCR9999999 - TXRE - Training Energy Corp. TXRE in TXRE - FAC-003-4 - NCR9999999 TX Editor 1

Transmission Vegetation Management

As an applicable Transmission Owner or applicable Generation Owner, is * FAC-003 applicable to your Facility(ies)?

Yes ▼

As an applicable Transmission Owner or applicable Generation Owner, have * you identified any Sustained Outages of applicable lines operated within their Rating and all Rated Electrical Operating Conditions for this submittal period?

| ▼
Yes
No

By clicking Save as Draft, you will have the ability to save your progress and come back and revise these responses prior to submittal. When you click Save, your responses will be finalized, and no further changes will be allowed.

Please note that prior to submitting your responses, you must finalize them as described above.

Save   Save Draft   Close

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Respond to a PDS Request

Standard is not Applicable

Transmission Vegetation Management

As an applicable Transmission Owner or applicable Generation Owner, is * FAC-003 applicable to your Facility(ies)?   [Yes ▼]

As an applicable Transmission Owner or applicable Generation Owner, have * you identified any Sustained Outages of applicable lines operated within their Rating and all Rated Electrical Operating Conditions for this submittal period?   [No ▼]

By clicking Save as Draft, you will have the ability to save your progress and come back and revise these responses prior to submittal. When you click Save, your responses will be finalized, and no further changes will be allowed.

Please note that prior to submitting your responses, you must finalize them as described above.

[Save] [Save Draft] Close

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Respond to a PDS Request

If Yes to second question, answer additional fields

Retrieve Data Submittal Form – FAC-003-4 using the hyperlink

Respond to a PDS Request

- **Completing qualifying questions**
  - Save – Saves responses
  - Save Draft – Saves responses for future review and edit
  - Close – Returns to qualifying questions
- **Saving answers to qualifying questions**
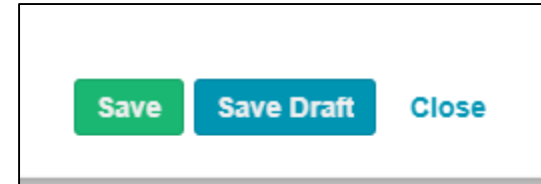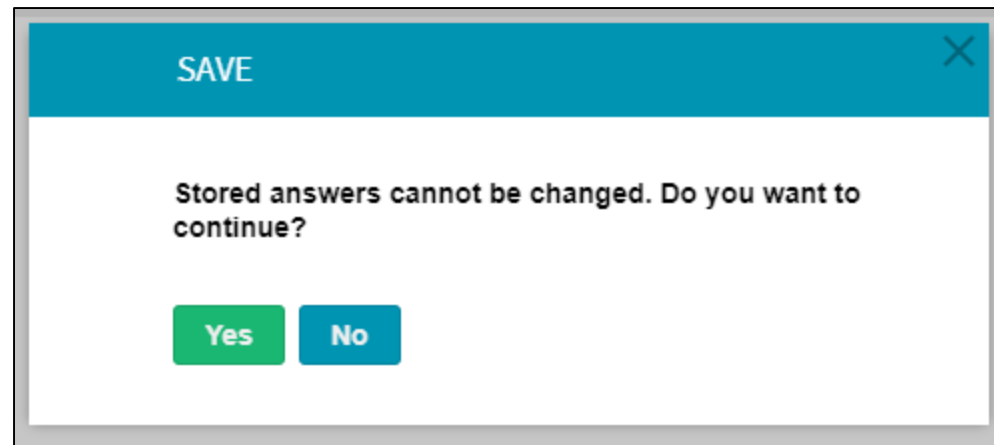
Respond to a PDS Request
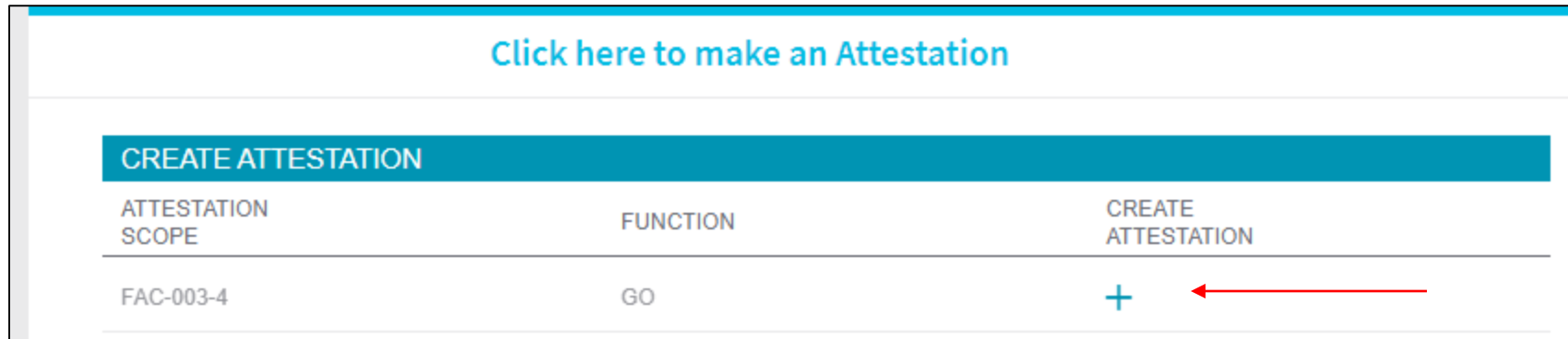
Qualifying questions process update

Q2 2021 FAC-003-4

General

Unique ID	PDS2021-000723
PDS for	FAC-003-4
Registration	NCR9999999 - TXRE - Training Energy Corp. TXRE in TXRE
PDS Name	Q2 2021 FAC-003-4
Description of Request	All vegetation related outages for the quarter, including category 1 and 2 outages previously reported (via the 48-hour report) and any category 3 outages shall be reported via webCDMS and the FAC-003-4 Texas RE Quarterly Data Submittal Form. This form is located in webCDMS under Compliance>Document Download section. FAC-003-4 quarterly reporting is due on the 20th of the month for the preceding quarter. To accommodate the attestation process moving forward, Texas RE requires an annual attestation form from all registered entities which do not own FAC-003-4 applicable Facilities. Once an attestation is received by Texas RE, these registered entities will not receive data submittal requests for FAC-003-4 unless warranted by facts and circumstances. If the registered entity would like to submit an annual attestation for the FAC-003-4 data submittal, please, complete the Attestation located in the Align Periodic Data Submittal, and submit. If conditions change that impact the registered entity's applicability to FAC-003-4, it is expected that the registered entity notify Texas RE (compliance@texasre.org) of the change to begin quarterly reporting for the first quarter in which the conditions changed. If you have questions, please contact compliance@texasre.org.

Submit on or after	July 7, 2021	Monitoring Period Start	April 1, 2021
But no later than	July 28, 2021	Monitoring Period End	June 30, 2021

Questions

Instructions	Open the questions to the right and answer each question. Need more time? Scroll down to Request an Extension. Have evidence to upload? Scroll down to the Evidence section.

QUESTIONS

ACTION

COMPLETED — Questions related to FAC-003-4 VERSION for NCR9999999 TX Editor 1

Update   Close

Respond to a PDS Request

Ability to attest to a PDS if the Standard and Requirement are not applicable

Create and complete the Attestation by choosing the "+"

Respond to a PDS - Attestation

Include Notes for the attestation

Respond to a PDS Request

Upload Evidence
- Data Submittal Form – FAC-003-4

→

Copy and Paste URL into browser
- https://eusstg.eroenterprise.com/nerc-infrastructure

→

Copy and Paste SEL nomenclature into SEL Violation ID field

Evidence

Secure Evidence Locker Instructions

Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at **https://eusstg.eroenterprise.com/nerc-infrastructure** with the following reference number:

TXRE|NCR9999999 - TXRE|PDS2021-000723|PDS2021-000723|FAC-003-4||

If the entity is hosting its own SEL, please provide a hyperlink to their locker in the comment section above.

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Respond to a PDS Request

Submit the PDS

- In Progress
- Submit Without Data
  - Provided an attestation
  - FAC-003-4 is applicable with no outages for the quarter
- Submit
  - Submit required evidence for a PDS (example Data Submittal Form – FAC-003-4)

Action

Instructions   Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action *   In Progress

In Progress

Submit Without Data

Submit

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Respond to a PDS Request

If the applicable Action is Submit Without Data

Action

Instructions Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action * Submit Without Data ▼

Update **Close**

If the applicable Action is Submit, a reminder to upload to the SEL will appear. If the applicable PDS form has been uploaded to the SEL, click the check box.

Action

Instructions Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action * Submit ▼

I have uploaded evidence related for this PDS to the SEL ✔

Update **Close**

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
PDS Notifications

Reminder PDS PDS2021-###### is approaching the deadline

Reminder PDS PDS2021-###### is overdue

Mon 7/5/2021 6:10 AM

A   Align <noreply@bwise.net>
    Test Mode: Reminder PDS PDS2021-002355 is approaching the deadline

To   AlignR2Testing@nerc.com
Cc   AlignR2Testing@nerc.com
Retention Policy   Texas RE Retention Policy - Default (6 months)   Expires   1/1/2022

WARNING: EXTERNAL SENDER. Always be cautious when clicking links or opening attachments. NEVER provide your user ID or password.

ALIGN Automatic email alert

Dear NCR9999999 Second Day Training Test 2 Editor 2,

The deadline of PDS PDS2021-002355 is approaching, we kindly request you to submit the data submittal before 07/13/2021

Please login to Align for more details.

This e-mail has been generated automatically. Do not reply to this address.

Sincerely,
Team Align

Wed 7/7/2021 6:15 AM

A   Align <noreply@bwise.net>
    Test Mode: Reminder PDS PDS2021-002149 is overdue

To   AlignR2Testing@nerc.com
Cc   AlignR2Testing@nerc.com
Retention Policy   Texas RE Retention Policy - Default (6 months)   Expires   1/3/2022

WARNING: EXTERNAL SENDER. Always be cautious when clicking links or opening attachments. NEVER provide your user ID or password.

ALIGN Automatic email alert

Dear Mark Johnson,

The deadline 06/16/2021 of the PDS PDS2021-002149 is past due. Please complete and submit the data submittal as soon as possible.

Please login to Align for more details.

This e-mail has been generated automatically. Do not reply to this address.

Sincerely,
Team Align

PDS Notifications

The Periodic Data Submittal (PDS2021-######) has been cancelled by Texas RE

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July 14 and 16, 2021

Slido Question

There are qualifying questions to complete prior to submitting the PDS to the Region.

A. True
B. False

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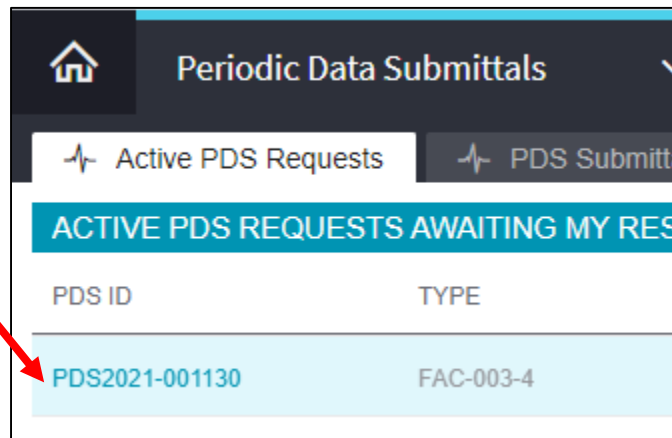
Break
Return: 9:40 AM

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Extension Request

Request an Extension

Choose the
hyperlink to open
the requested PDS

Request an Extension

When the PDS opens, scroll down to "Click here to Request an Extension"

Click here to Request an Extension ⬅
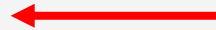
Click here to Request an Extension

	RFE ID	ORIGINAL DUE DATE	REQUESTED NEW DUE DATE	APPROVED NEW DUE DATE	REASON FOR EXTENSION	STATUS
+ ⬅			This table is empty			

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Request an Extension

Enter the requested due date and a reason for the extension

Request an Extension

Action will remain as "In Progress"

Choose Update to send the extension request to the Region

Action

Instructions	Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.
Action *	In Progress ▼

Update Close

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Request an Extension

Confirm the extension request was approved

- Align email notification
- Align PDS DUE DATE field updated

Before

After

Request an Extension - Notifications

A deadline extension has been requested for (PDS2021-######)

Deadline extension request (PDS2021-######) is approved

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Creating an
Event Driven PDS

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Event Driven NERC Standards

PRC-002-2 for GO and TO registrations

EOP-008-2 for BA, RC, and TOP registrations

TPL-001-4 for PA, PC, and TP registrations

TPL-007-4 for PC and TP registrations

Create Event Driven PDS

Create PDS tab
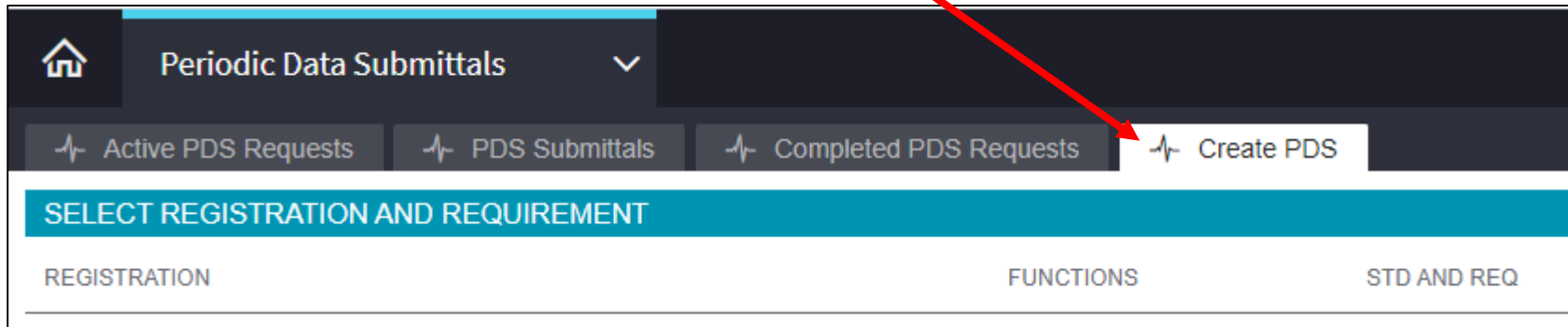
Event driven PDS

A predetermined list of event driven PDS are available on the Create PDS tab. The list is based on the entity's registered functions.

Event driven PDS

Choose the applicable "+" to begin the PDS

Event driven PDS – Part One

Complete the PDS Name, Monitoring Period End date, PDS Description, and Update

The screen will update

Please wait

70%
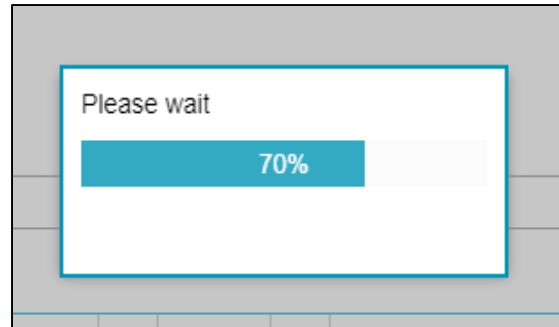
Align Event Driven PDS will return to the Create PDS screen.

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Event driven PDS – Part Two

Refresh the MY SELF-CREATED PERIODIC DATA SUBMITTAL DRAFTS page

Before

After

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Event driven PDS – Part Two

Locate the newly created PDS

- Select the UNIQUE ID hyperlink to continue with the PDS

Event driven PDS – Part Two

Complete the applicable Standard PDS qualifying questions

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Event driven PDS – Part Two

Once the Qualifying questions have been completed and saved, the progress bar will update.

Event driven PDS – Part Two

Upload Evidence to the SEL, if applicable → **Copy and Paste URL into browser**
- https://eusstg.eroenterprise.com/nerc-infrastructure

→ **Copy and Paste SEL nomenclature into SEL Violation ID field**

Evidence

Secure Evidence Locker Instructions: Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at **https://eusstg.eroenterprise.com/nerc-infrastructure** with the following reference number:

→ **TXRE|NCR9999999 - TXRE|PDS2021-000733|PDS2021-000733|PRC-002-2||**

If you are hosting your own SEL, please provide a hyperlink to your locker in the comment section above.

Action

Instructions: Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action: No Action

Update **Close**

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Event driven PDS – Part Two

Submit to Texas RE

- Select Submit if related files are uploaded to the SEL
- Select Submit Without Data if no files are uploaded to the SEL
- Select Delete to delete this event driven PDS.
- --None-- and No Action will not advance the PDS

Event driven PDS – Part Two

Choose Update to send the event driven PDS to the Region.

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The Region response options

- Send a Request for Information (RFI)
- Close
  - Close with PNC
  - Close with no PNC
- Review Completed

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Event driven PDS – Part Two – Entity

Navigate to Completed PDS Requests to review the completed PDS

List all completed PDS

Region response

Attestations

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Attestations

If your entity has supplied an attestation in Align, it will appear under My Align, in Attestations
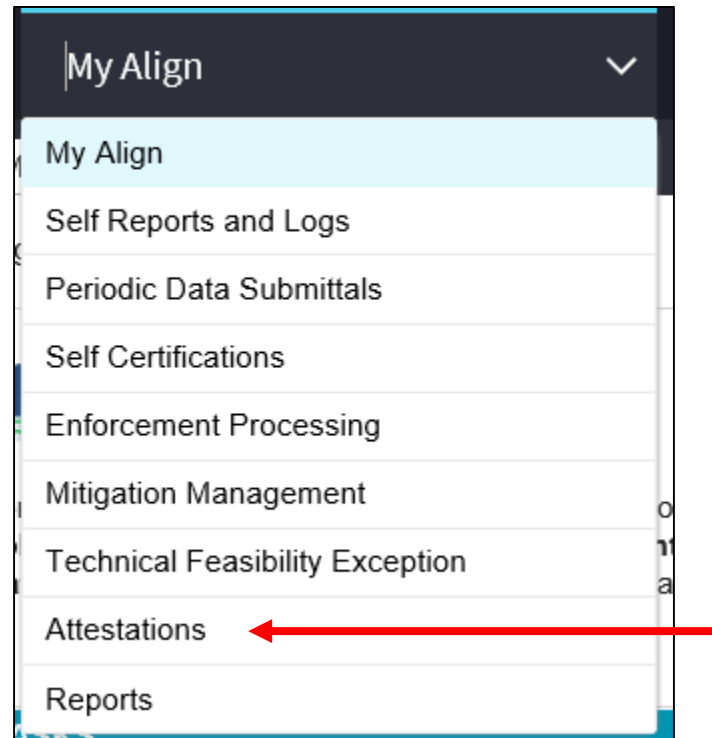
Attestations

Navigating to Attestations will allow the review of all attestations

Active Attestations

Attestations in review with the Region

Attestations due for Reaffirmation

Expired and Inactive Attestations

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FAC-003-4 Data Submittal Qualifying Question

Is FAC-003-4 applicable to your registration?

↓ No → Create Attestation → Submit to Region without data

↓ Yes → No Experienced Outages →

Experienced Outages → Answer additional questions. Download and complete the FAC-003-4 data submittal form. → Upload form to SEL → Submit to Region

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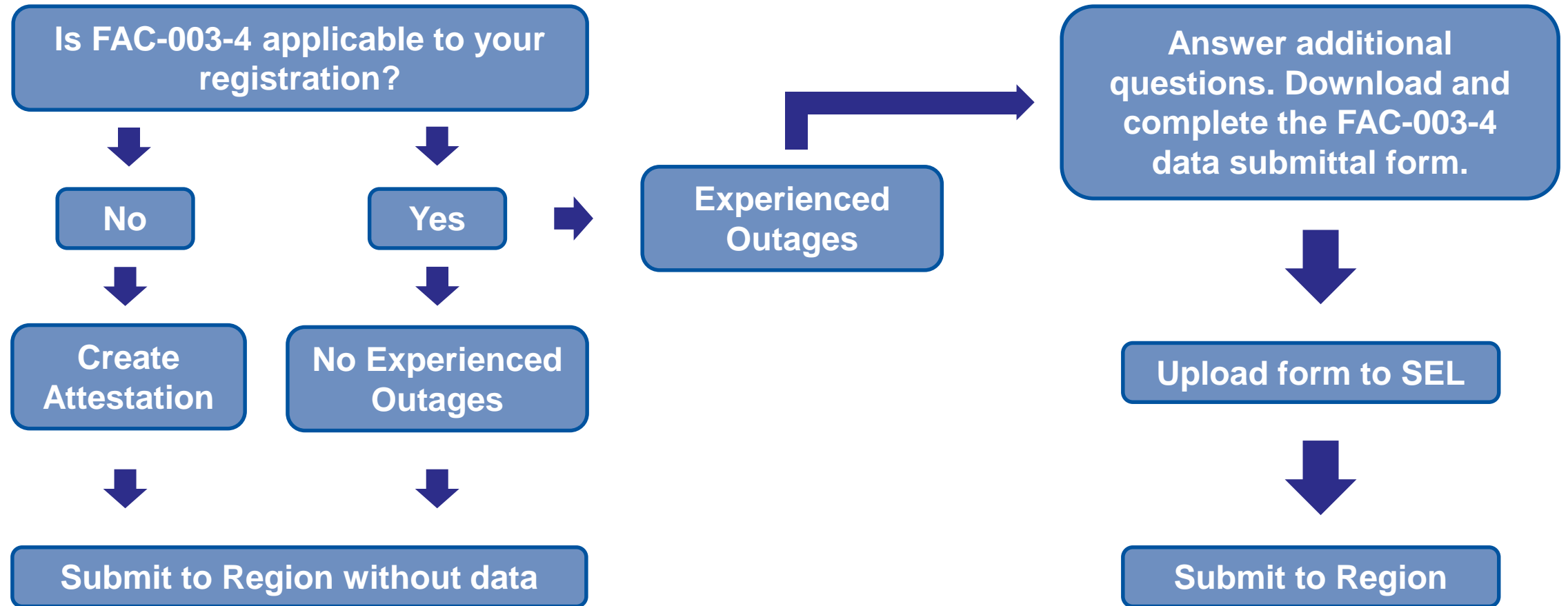
Slido Question

An attestation can not be created in Align.

A. True
B. False

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ERO Secure Evidence Locker

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ERO SEL

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File Types

- Allowed: .docx, .xlxs, .pdf, .jpeg, .ppt, etc.
- Not allowed: ajr, gz, tar, zip

Reference ID Format

- TXRE|NCR01234|TEST202101|TEST202101|CIP-005-6|R1|1.1

Email Manifest

- Shows reference ID and date stamp

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Current	ERO SEL
Extranet managed by Texas RE. Registered entities can view evidence submitted in permitted folders in the Extranet. Can upload evidence to webCDMS.	ERO Enterprise wide locker managed by NERC. Registered entities receive manifest file. Registered entities need ERO Portal account. Registered entities cannot view or delete documents uploaded to SEL. Registered entities cannot upload evidence to Align. Evidence shall be uploaded to the SEL.

How to Enter a
Help Desk/FootPrints Ticket

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Post Support System: Help Desk/FootPrints Support

➤ Submit ticket to: https://support.nerc.net/ through the ERO Portal
➤ Routed to Texas RE staff for resolution

Level 0 Support	Level 1 Support	Level 2 Support	Level 3 Support
Self-Service Resources	**Regional POC (L1)**	**NERC Support (L2)**	**BWise Tech Support (L3)**
Resources that can be accessed directly, on-demand, by end-users to answer frequent questions or issues	*Regional Entity Point of Contact that manage issues for, and responds to, registered entity end-users*	*Centralized NERC team that helps resolve complex or technical inquiries*	*BWise technical support resources that help resolve system issues*
• Align training materials • Quick reference guides • Training recordings/videos • FAQs	• Receive end user issues via FootPrints • Resolve/respond to basic inquiries using support resources or collaborating with regional counterparts • Consult with L2 resources as appropriate • If able to resolve issue, update FootPrints and respond to registered entity end user to close loop • Submit Regional issues requiring NERC Support in FootPrints (e.g., regional user termination requests)	• Review FootPrints backlog, prioritize, and address issues • If able to resolve issue, reach out to Regional POC and close ticket once end-user confirms the issue has been resolved • If unable to resolve issue, escalate to BWise support team to troubleshoot • Once issue is resolved, reach out to Regional POC and close ticket in FootPrints • Escalate major support issues to IT Leadership • Generate reports on a weekly basis to track and report on key metrics	• Coordinate with NERC Support to assign, prioritize and resolve issues • Troubleshoot system issues • Contact NERC Support upon issue resolution • Escalate major support issues to appropriate BWise leadership

If unable to resolve issue, escalate to NERC Support via FootPrints

If unable to resolve issue, contact BWise Technical Support

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Help Desk/FootPrints Ticket

Navigate to the ERO Portal on NERC's website (https://eroportal.nerc.net/) → **Select Help Desk**

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Help Desk/FootPrints Ticket

Complete the Captcha

How To Enter a Help Desk/FootPrints Ticket: Align

> **Populate all fields that contain a red asterisk**

> **Select the following for proper routing:**
- **Service:** ERO Enterprise Applications
- **Category:** Align for Entities
- **Sub-Category:** Leave blank if not applicable

> **File Attachment:** Include screenshots of the issue.

> **Description**: Include description of the issue.

How To Enter a Help Desk/FootPrints Ticket: ERO SEL

➤ **Populate all fields that contain a red asterisk**

➤ **Select the following for proper routing:**
- **Service:** ERO Enterprise Applications
- **Category:** Secure Evidence Locker (SEL)
- **Sub-Category:** File Submission **or** Registered Entity Account Access

➤ **File Attachment:** Include screenshots of the issue.
➤ **Description**: Include description of the issue.

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Help Desk/FootPrints Ticket Notification

A FootPrints Ticket notification will be generated and sent to your email address

Work with your IT group to whitelist the FootPrints notification emails

From: FootPrints <erosupport@nerc.net>
Sent: Monday, April 5, 2021 11:22 AM
To: Texas RE Extranet <Extranet@texasre.org>
Subject: Service Request Ticket ERO-20058 has Been Assigned To You or Your Team Ticket= ERO-20058 ItemType= 10749 WS= 3745

WARNING: EXTERNAL SENDER. Always be cautious when clicking links or opening attachments. NEVER provide your user ID or password.

When replying, type your text above this line.
_____

The following Service Request has been assigned to you or your Team. Please acknowledge assignment and advance the Status of the ticket as appropriate.

Ticket Type	Service Request
Ticket Number	ERO-20058
Created On	04/05/2021 12:22:02
Summary	ERO Enterprise Applications - ALIGN: Align: Testing FootPrint Ticket to the Extranet Email Box
Assignees	Texas RE ALIGN;
Assisted By	
Service	ERO Enterprise Applications
Category	ALIGN
Sub-Category	
All Descriptions	04/05/2021 12:22 PM	System: This is a test to confirm FootPrint ticket goes to the subfolder created for all tickets. Email sent by:noreply@nerc.net
Contacts Full Name	Rochelle Brown

Client Support Services
Phone: 404.446.9790 (Mon-Fri 8am to 5pm) | 609.452.1893 (After Hours)
Portal: https://support.nerc.net

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Resources, Stay Informed, and Training

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Training Resources

Registered Entity Training Materials

- **Registered entity PDS videos – 7**
  - Appox. 15 minutes
- **User Guides**
  - Registered Entities: Release 2 User Guide
  - Registered Entities: Release 2 Process Harmonization
  - Registered Entities: Release 2 Start Stop Continue Guide

8. Periodic Data Submittals (PDS)

⊙	22) Responding to a PDS request (4m 51s)	00:04:51
⊙	23) Requesting a PDS Extension (1m 14s)	00:01:14
⊙	24) Creating an Attestation (2m 00s)	00:02:00
⊙	25) Reaffirming an Attestation (56s)	00:00:56
⊙	26) Rescinding an Attestation (26s)	00:00:26
⊙	27) Creating a Periodic Data Submittal (4m 04s)	00:04:04
⊙	28) Reopened PDSs (1m 25s)	00:01:25

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<u>**Stay Informed**</u>

- **Texas RE website: <u>Align page</u>**

- **Texas RE*view*, Align Newsletters, announcements, and social media**

- **Visit NERC's <u>Align page</u>**

- **Join Talk with Texas RE meetings for Align updates**
  - <u>Reliability 101 - Intro to Align</u>: July 21, 2021 1:30 pm – 2:30 pm

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Align Release 2 Training: TFEs and Self-Certifications

- **Two opportunities to attend training for TFEs and Self-Certifications**

- **August 10, 2021 from 9 am – noon**
  - [WebEx Link](#)
- **August 17, 2021 from 9 am – noon**
  - [WebEx Link](#)

Slido Question

If I need assistance with Align or the ERO SEL, I contact:

A. Information@texasre.org
B. Compliance@texasre.org
C. www.texasre.org
D. https://support.nerc.net/

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Questions?