



ERO Portal Access and  
Application Information

WECC Registration Staff

# Overview Information

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This information will help you and your team make appropriate changes in the ERO Portal and associated systems when personnel changes occur in your company.

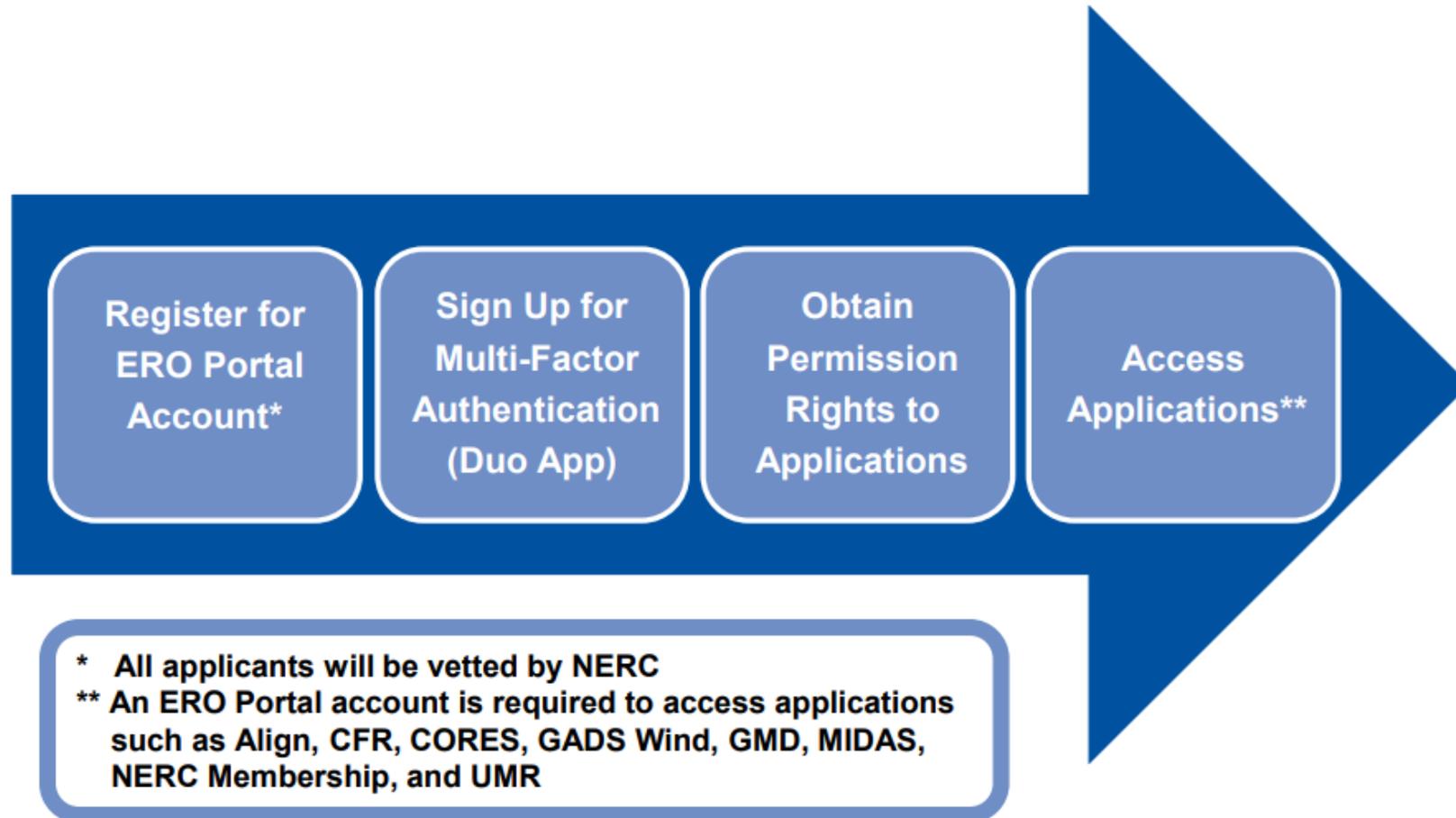
- ✓ Any user with an ERO Portal account that has entity admin rights to a specific entity record can review and edit permission rights for that entity. Additionally, contact roles should be updated in CORES as soon as a role change has been determined. Alternate Compliance Contact (ACC) roles can be deactivated, but Primary Compliance Contact (PCC) and Primary Compliance Officer (PCO) roles have to be changed by adding the new contact and allowing the system to deactivate the previous person that was in that role.
- ✓ Please also open a [help desk ticket](#) under your name that reflects all users that need their ERO Portal accounts deactivated.
- ✓ **It is essential for all registered entities to annually review their contact information and update it accordingly. Updating contact information is critical to ensure effective communication and avoid inadvertent time delays.**
- ✓ An entity should ensure contacts are up to date in all applicable systems – Section 1600, NERC Alerts, etc. A list of recommended items to complete can be found in the [Onboarding Checklist](#). There is also a more comprehensive document called the [ERO Enterprise Informational Package](#) for additional guidance.

# Content

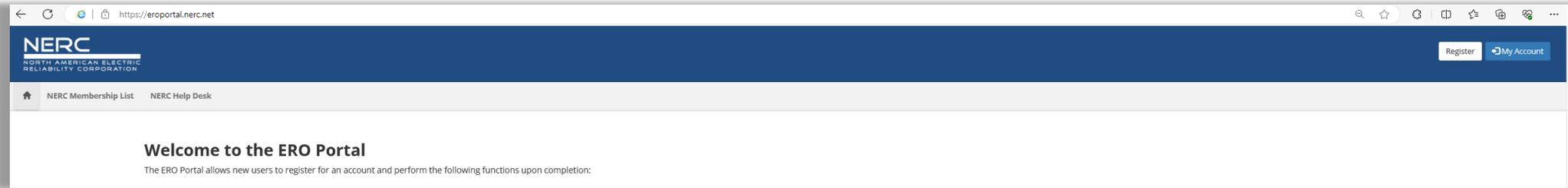
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- **Slides 4 – 7** informs a new user how to set up an ERO Portal account and multi-factor authentication (MFA) using the Duo App.
- **Slide 8** reviews when access rights and contact roles should be changed and when requests to deactivate a ERO Portal account should be submitted.
- **Slides 9 – 12** includes instructions on how a new user submits a request to obtain access rights to an entity record and how an entity admin would reject or approve the request.
- **Slides 13 – 15** shows how an entity admin can add/remove user permission rights as needed per entity record.
- **Slides 16 – 20** includes information on how to make contact role changes in CORES.
- **Slide 21** contains links to training materials.

# ERO Portal Access



# ERO Portal Account Required



## To Set up an ERO Portal Account:

- Navigate to <https://eroportal.nerc.net>
- Select “Register” in the upper right-hand corner
- Complete the registration form and click “Submit”

## To Verify an ERO Portal Account:

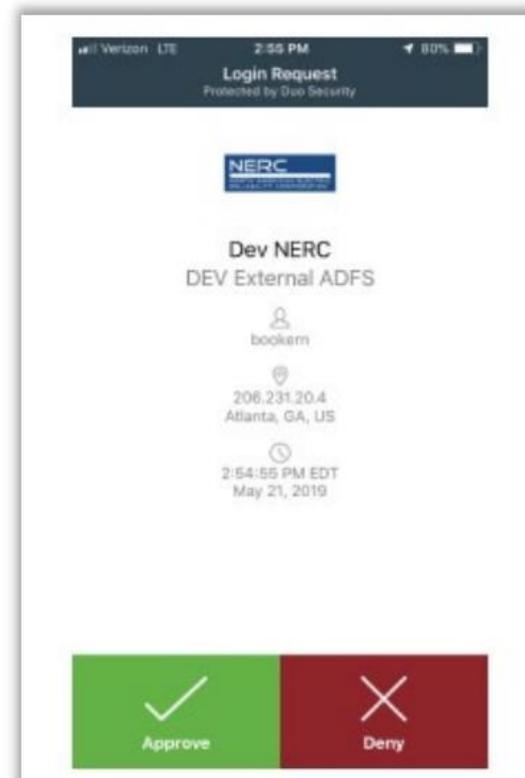
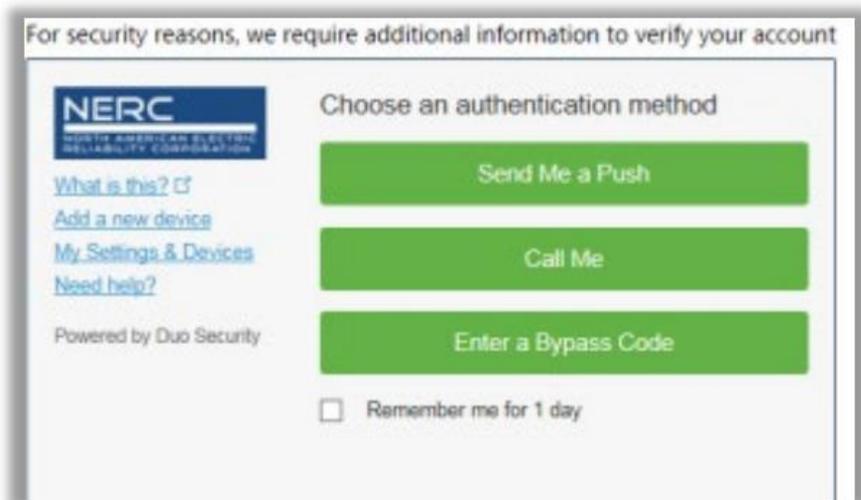
- Navigate to <https://eroportal.nerc.net>
- Select “My Account” in the upper right-hand corner
- Select “Sign In”
- Enter your credentials to confirm access to the ERO Portal

# Set Up Multi-Factor Authentication (MFA)

The image is a screenshot of the NERC Duo Two-Factor Authentication setup page. At the top left is the NERC logo (North American Electric Reliability Corporation). Below the logo, the text reads "For security reasons, we require additional information to verify your account". The main content area is a white box with a light gray border. On the left side of this box is the NERC logo again, followed by links: "What is this? ⓘ", "Add a new device", "My Settings & Devices", and "Need help?". Below these links is the text "Powered by Duo Security". On the right side of the box, the question "What type of device are you adding?" is displayed. Below the question are three radio button options: "Mobile phone RECOMMENDED" (which is selected), "Tablet (iPad, Nexus 7, etc.)", and "Landline". At the bottom right of the box is a green "Continue" button.

# Use Duo

## Using Duo is Easy



# When to Request/Remove Permission Rights

## When to change permission rights and contact roles

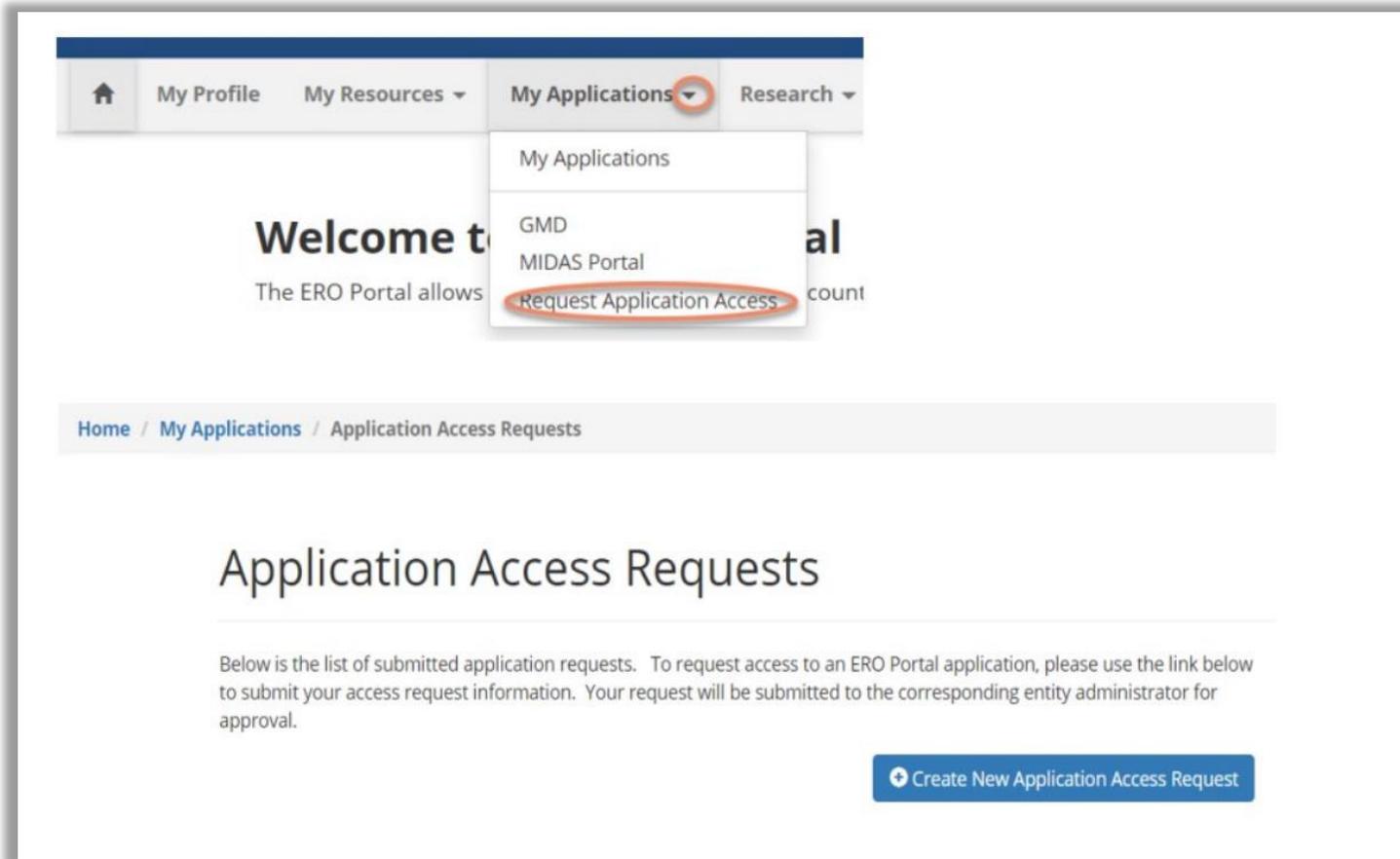
- Compliance management or entity ownership changes
- Role and responsibility changes within organization
- User/contact leaves the company

## Actions to perform

- Request access or change permission rights in the ERO Portal
- Change contact roles in CORES
- Open a Help Desk ticket to “Deactivate” the ERO Portal account
  - <https://support.nerc.net>

# Request Application Access

- Select request Application
- Select Create new Application Access Requests



# Submit New Application Request

## Request Application Access

[Back to Application Access Requests](#)

Request access to an ERO Portal application by using the form below. Here is a list of applications you may request access to:

Application	Role	Role Description
<b>All Applications</b>	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.
<b>ALIGN</b>	Align Registered Entity Editor	This person can create and edit items in Align for the Entity he/she is associated with.
<b>ALIGN</b>	Align Registered Entity Reader	This person can view items in Align for the Entity he/she is associated with.
<b>ALIGN</b>	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.
<b>CORES</b>	CORES User	This person can create/edit registration information (including CFRs/JROs) and run registration reports for the entity he/she is associated with
<b>GMD</b>	GMD User	This person can view and submit GMD data and run GMD reports for the entity he/she is associated with.
<b>GMD</b>	GMD Read-Only	This person can view GMD data and run GMD reports for the entity he/she is associated with.
<b>MIDAS Portal</b>	MIDAS User	This person can create/edit and submit MIDAS data and run MIDAS reports for the entity he/she is associated with.
<b>MIDAS Portal</b>	MIDAS Read-Only	This person can view MIDAS data and run MIDAS reports for the entity he/she is associated with.

Entity ■

Requested Application Role ■

Requester Comments

Submit

### Enter the following:

- NERC registered entity or a non-registered entity that has reporting obligations (MIDAS, GADS, etc.)
- Role Type
- Comments if applicable

### Upon submission:

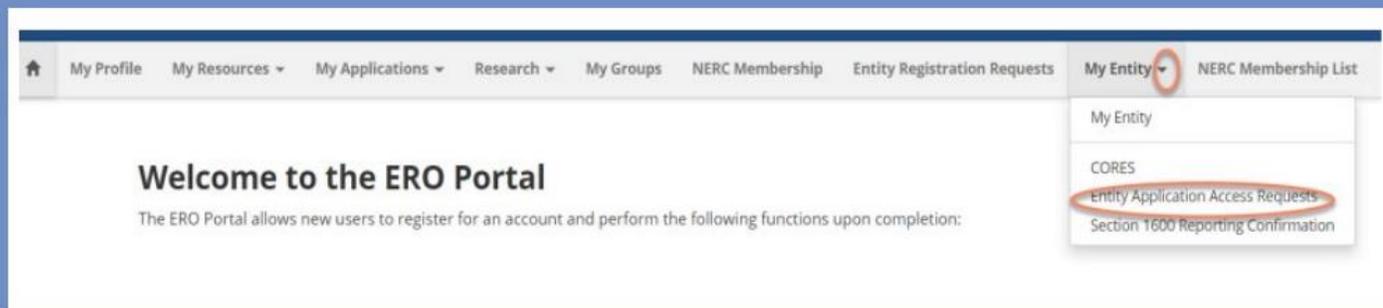
- Confirmation notification is sent to the applicant
- Review notification is sent to Entity Administrator(s)

# Review Application Requests as Entity Admin

Option 1: Select **New Notifications** from the top menu option



Option 2: Select **My Entity** and **Entity Application Access Request**



**Note:** Only Entity Administrators may approve/request access requests

# Process Application Requests as Entity Admin

## Option to Approve/Reject Request

### Application Access Requests

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

You can also view and manage all users for your entity on the [Manage Entity Page](#).

Requested By	Email Address	Phone	Requested Application Role	Requester Comments	Request Status	Created On ↑	
			CFR Administrator		Pending	6/24/2020 5:42 PM	▼
			Entity Admin		Pending	5/27/2020 1:04 PM	▼

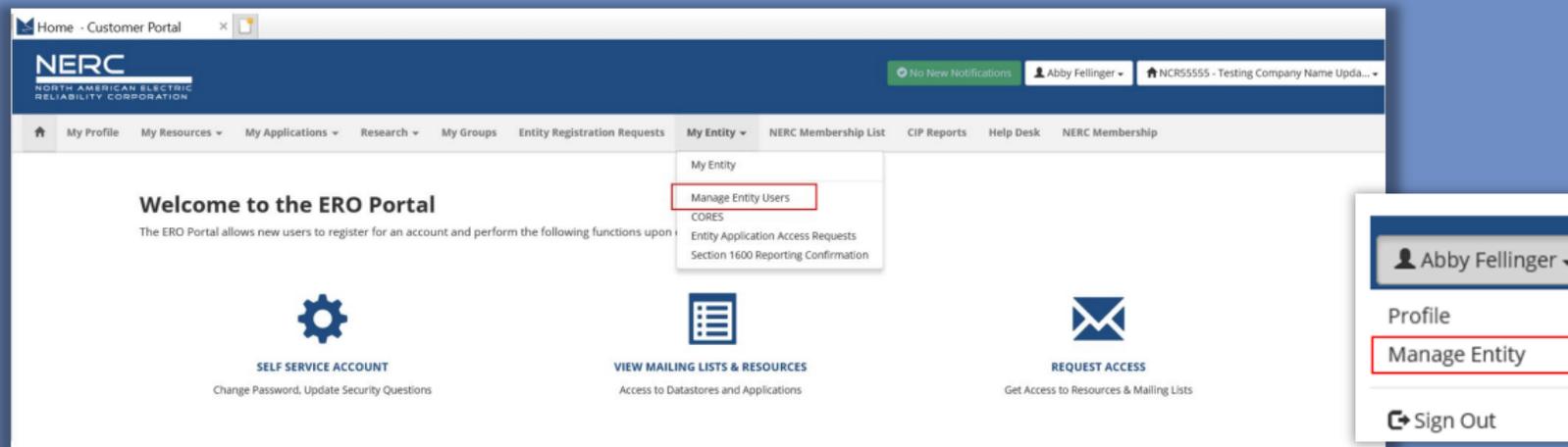
▼

- ✓ Approve Request
- ✗ Reject Request

▼

# Review/Change Permissions as Entity Admin

Select Manage Entity Users or Manage Entity



Entity Administrator(s) can review and change who has access to the entity record

# Review/Change Permissions as Entity Admin

There are three options under Manage Entity Users:

- To review Entity User(s) access permissions, click on **User** (listed in blue font)
- To grant access rights to other users, select **Add User**
- To remove access rights for a specific user, select **Remove User**
  - Note: The user will be removed instantly

Manage Entity Users - Custo... x

NERC  
NORTH AMERICAN ELECTRIC  
RELIABILITY CORPORATION

No New Notifications | Abby Fellingner | NCR5555 - Testing Company Name Upda...

My Profile | My Resources | My Applications | Research | My Groups | Entity Registration Requests | My Entity | NERC Membership List | CIP Reports | Help Desk | NERC Membership

Home / Manage Entity Users

### Manage Entity Users

Entity Name: Testing Company Name Update, LLC | NERC Number: NCR5555

Entity Users

The following users are associated with this entity:

User	City	State	Phone	E-mail Address	Action
Abby Fellingner	Austin	TX			Remove User

Add User

# Edit Permission Rights as Entity Admin

## Edit Permission Rights

- Select the **Edit** button
- Adjust User Permissions as needed

Manage User Permissions

[Back to User Management](#)

**User Information**

User	Username	Email
Abby Fellingner		

**Permissions User Has**

Role	Entity	NERC Number (Portal User Parent Account)	Created On
Entity Admin	Testing Company Name Update, LLC	NCR5555	4/6/2021 2:39 PM
CORES User	Test Entity	VR000006	10/28/2020 11:30 PM

[Edit](#)

User Permissions

Manage User Permissions for: Abby Fellingner

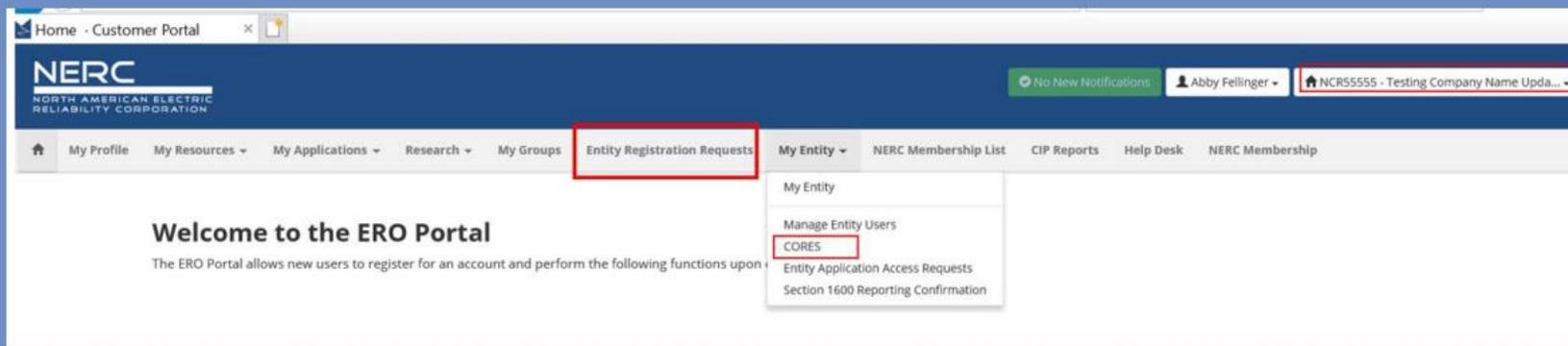
- CORES User
- GMD User
- GMD Read-Only
- MIDAS User
- MIDAS Read-Only
- Entity Admin
- Align Registered Entity Editor
- Align Registered Entity Reader
- Align Registered Entity Submitter

[Submit](#)

# Accessing **CORES**

CENTRALIZED ORGANIZATION REGISTRATION ERO SYSTEM

- Create a new registration application under **Entity Registration Requests**
- Review and update information for an existing registered entity under **CORES**



## Submitting a New Registration Request in CORES

# CORES

- CORES was created by moving core registration functions that were managed in OATI - webCDMS, Guidance – CITS and CRATS into a consolidated system
- CORES allows:
  - A consistent Regional Entity and registered entity process
  - The ability to import data elements into Align

The screenshot shows a registration form with the following fields and values:

- Entity Name:** Testing Company Name Update, LLC
- New Name Pending Approval:** New Testing Company Name Update, LLC
- Acronym:** TC2
- NERC Number:** NCR55555
- Phone:** 8018199405
- Website:** http://097097
- Has a NERC-Led Panel Request been submitted?:**  No  Yes
- Street 1:** 2191 E Gregson Ave
- Street 2:** (empty)
- City:** Salt Lake City
- State/Province:** UT
- Country:** United States
- ZIP/Postal Code:** 84109

✓	Basic Information
✓	Upstream Holding Companies
✓	Contact Roles
✓	Entity Scopes
✓	Functional Mapping
✓	Coordinated Oversight
✓	CFR
✓	JRO
✓	Comments and Attachments

# Contacts in CORES

- Select **Contact Roles**
- Create or revise Contact Roles
  - Primary Compliance Contact (PCC), Primary Compliance Officer (PCO),
  - Alternate Compliance Contact (ACC), and Chief Executive Officer (CEO)

Home / CORES / Contacts

- This form is used for updating the contacts for your registered entity. The two required contacts for registration are Primary Compliance Contact and Primary Compliance Officer.
- If you would like to update personal information associated with your contact record (name spelling, email address, phone, address, etc.), please click this [link](#) to edit your Profile.
- If you would like to request access to an application or manage a request for access to an application, please click this [link](#) to manage application requests.
- If you would like to manage the permissions associated with your contact record or the permissions of other contacts associated with your entity, please click this [link](#) to manage entity user permissions.
- [Training Link](#)

### Contact Roles

Active Contact Roles

[Create](#)

Contact ↑	Entity	Role Type	Username (Contact)	E-mail (Contact)	Name (Region)
Abby Fellingner	Testing Company Name Update, LLC	Primary Compliance Contact (PCC)			

Inactive Contact Roles

Contact ↑	Entity	Role Type	E-mail (Contact)	Region	Modified On
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- ✓ Basic Information
- ✓ Upstream Holding Companies
- ✓ **Contact Roles**
- ✓ Entity Scopes
- ✓ Functional Mapping
- ✓ Coordinated Oversight
- ✓ CFR
- ✓ JRO
- ✓ Comments and Attachments

The PCC and PCO are required contact roles | The ACC and CEO roles are optional in CORES

**Note:** If the entity record is managed by another party, an owner representative must be listed within one of the contact roles.

# Create Contact(s) in CORES

- The new contact must have an active ERO Portal account
- The previous PCC or PCO user role will be deactivated once a new PCC or PCO role is added to an entity record

The screenshot shows a 'Create' form with the following fields and callouts:

- 1 - Select Role Type**: A dropdown menu with options (PCC, PCO, ACC, CEO).
- 2 - Enter applicable email address**: An input field for the email address.
- 3 - Select Find Contact**: A button labeled 'Find Contact'.
- 4 - Applicable name should manually populate**: An input field for the contact name.
- 5 - Select the applicable Regional Entity**: A dropdown menu for selecting a region.
- 6 - Select Submit**: A blue 'Submit' button.

Additional text in the form includes instructions for 'New Entity Registration Requests' and 'Updating Contact Roles for a Registered Entity'.

# Deactivate Contact(s) in CORES

Deactivate any ACC or CEO contact roles that are no longer applicable

Role Type ↑	Username (Contact)	E-mail (Contact)	Name (Region)	Created On	
Alternate Compliance Contact (ACC)			WECC	4/22/2021 1:50 PM	 

# Training Materials

## Available Resources

[ERO Portal End User Guide](#)

[Registered Entity Request Access Process](#)

[ERO Portal Videos](#)

[CORES End User Guide](#)

[NERC Multi-Factor Authentication Guide](#)

[NERC Help Desk](#)



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