DER (MG) Data portal – User Guide v4

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About this guide

The 'AESO Enterprise Data Portal' is a suite of the AESO online portals meant to provide a unified platform for a secure single point of data & document exchange with the AESO's external stakeholders. The 'Distributed Energy Resources (DER) Data Portal' is part of that suite, meant for exchange of static data related to Micro-Generation (MG) type DERs. The Distribution Facility Owners (DFOs) representatives will use this portal to send the 'DER (MG) Static Data' to the AESO. Please **note** that currently only Micro-Generation (MG) type DER data can be provided through the portal.

This guide is for users of the 'DER Data Portal'. In this document, 'DER (MG) Static Data' would be referred as 'DER data' and the 'DER Data Portal' will be referred to as 'Portal' only. Also, note that dummy data and users have been used to create the screenshots.

This will guide the users on how to:

- Sign-Up, to be a portal user
- Sign-In, as a portal user to enter or view DER (MG) static data
- Create DER data record by
 - Data entry in the portal
 - File upload
- Submit DER data record by
 - o Individual form submission
 - Multiple records submission
- View or Update DER data
 - View and Download DER data
 - Update DER data
- Things to remember



1. Sign-up

The DFOs representatives will need to request the AESO for portal access via sign-up process. The 'DER Admins' on the AESO's side will verify the user and approve them to use the Portal.



Steps to sign-up for the prospective DFO users of the portal:

1. Go to the 'AESO Enterprise Data Portal' homepage, as below, using the URL provided in Appendix.



Where,

- 1- Homepage as shown above
- 2- Support Documents contains documents like user guides, templates etc. to help you access and navigate within the portal for date exchange.
- 3- Sign In brings up the Sign In page
- 4- DER Sign-Up link to the sign-up form for DER Data Portal

2. Click on the DER Sign-Up link. An empty DER Data Portal Sign-Up form will open:

a	250 🖤	Home User Manual Sign in
DE	R Data Portal Sign-up	
Please	note, only Distribution Facility Owner representatives can request access to the AESO DE	R Portal.
Wire Service Provider *		
First Name *	Last Name *	
Phone *	Email *	
Reason for requesting AESO Portal Access *		
DOWTAN		
RSX13 v		
RSXJj V. entre a new image the audio code Enter the code from the image	,	

- 3. Complete the Sign-up form click 'Submit' button at the bottom of the page. *Note*:
 - If you use Office365, please use your cloud credentials in the email field. If you are unsure about what these are, please check with your IT support team to verify the correct credentials to use.
 - For security reasons, you must sign-up with your individual email. If more than one-member sign-up for a DFO then all will be able to see the records for that DFO irrespective of who created it but only the creator of the record will be notified on record update.
 - It is recommended that there should be at least two users from each DFO to be able to fill in for other's absences
- 4. The sign-up request is sent to the AESO's DER Admin and a submission successful message will be displayed on the page with details of what to expect next, as shown, below.



5. If the access is 'Approved' by the AESO's DER admin, then,



5.1. The applicant will receive a Microsoft Invitation email, on behalf of the AESO to be included in the AESO's Azure Active Directory. The applicant must 'Accept Invitation'.

A Mice	osoft Invitations on behalf of Alberta Electric System Operator <invites@microsoft.com> Fri, Feb 19, 9.49 AM</invites@microsoft.com>	☆
	• Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.	
	Organization: Alberta Electric System Operator Domain: aeso.ca	
	If you accept this invitation, you'll be sent to https://aeso-portal-integ.powerappsportals.com/request-submitted/ .	
	Accept invitation	
	Block future invitations from this organization.	
	This invitation email is from Alberta Electric System Operator (aeso.ca) and may include advertising content. Alberta Electric System Operator has not provided a link to their privacy statement for you to review. Microsoft Corporation facilitated sending this email but did not validate the sender or the message.	
	Microsoft respects your privacy. To learn more, please read the Microsoft Linkow Statistication. Microsoft Corporation, One Microsoft Way, Redmond, WA 98052	

5.2. 'Accept Invitation' will display another page to wait for another confirmation email.



5.3. The applicant will then be a DER Data portal user and will receive a confirmation email with link to the Sign In page. The confirmation email will look like this:





6. If the access is 'Rejected' by the AESO's DER admin, then, the applicant will receive an email with reason for rejection.



2. Sign-In

After receiving the confirmation email the user can Sign-In to the portal using the link provided in the email or to go to the portal using the URL provided in Appendix.

2.1 Landing Page and DER records

On Sign-In, user will see this Landing page:

Apps	e ×
✓ Search my apps	💍 Refresh
← Published Apps (1)	
AESO Apps AESO Enterprise Data Portal	

Clicking on 'AESO Apps' box will take user to the Summary page for the 'DER (MG)' records.

There will be no records on the summary page initially. The list will grow as DER data is entered in the portal. More details on how to view the records are provided in the 'View or Update DER Data' section.

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=	E Show Chart + New O Refresh S Email a Link E Email a Link E Email a Link E Export to Excel Excel E Email a Link E Email a Link	\sim	💐 Import from Excel	~
 ☆ Home ↔ Recent 	All Active DER (MG) records ~	7	Search this view	م
	✓ 13 Digits Site ID ↑ ∨ Nameplate Capacity (k ∨ Wire Service Provider (∨ Submission Date >	~	Modified On \checkmark	
	130000000011 City of Medicine Hat		2/22/2021 5:45 PM	
DER (MG)	130000000012 City of Medicine Hat		2/22/2021 5:51 PM	
🛱 DER (MG)s				
₩ Wire Service Providers				
DER (MG)	ABC 1 - 2 of 2 (0 selected)			

aeso

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63 ⊡ ∽	Home Recent \checkmark Pinned \checkmark	Active Wire Service Providers ∽ ✔ Name ↑ ∽	Modifie	√ d On ∨	Search	ı this vi	ew
DEF	R (MG) DER (MG)s	ATCO Electric City of Lethbridge	2/19/2 2/19/2	.021 12:0 .021 12:0	2 AM 2 AM		
\$	Wire Service Providers	City of Medicine Hat City of Red Deer	2/19/2	021 12:0	2 AM 2 AM		
		ENMAX	2/19/2	021 12:0	2 AM 2 AM		
D(DER (MG)	ABC 1 - 7 of 7 (0 selected)	2/19/2	021 12:0	2 AM		

The other entity 'Wire Service Provider' only shows the list of DFOs.

2.2 Personalization settings

By default, the time zone in 'DER data portal' is set to GMT/ UTC (Coordinated Universal Time). This can create confusion for a DFO user as all the DFOs and the DERs in Alberta operate in Mountain time. It is therefore recommended that users change the time zone for their DER Data Portal login to Mountain time.

To change the time zone, go to 'Personalization settings' on the blue ribbon at the top.





A new pop-up window with all the editable user specific settings will open. The user shall change the Time Zone to Mountain Time (US & Canada) and press OK. This will show the time in mountain time for that user.

Set Persor	al Options	? X
Change the defau	It display settings to personalize Microsoft Dynamics 365, and manage your email templates.	
General Synchroniza	ion Activities Formats Email Templates Email Signatures Email Privacy Languages	
Select your home page	and settings for Get Started panes	
Default Pane	<default based="" on="" role="" user=""> Cefault based on user role></default>	~
Set the number of reco	ords shown per page in any list of records	
Records Per Page	50 V	
-		
Select the default mod	e in Advanced Find	
Advanced Find Mode	Simple Detailed	
Set the time zone you	are in	
Time Zone	(GMT-07:00) Mountain Time (US & Canada)	
Select a default curren	cv	
Currency		
Support high contrast	settings	
Select this option if you	are using the High Contrast settings in your browser or operating system.	
Enable high contr	ast	
	ОК	Cancel



3. Create and Submit DER data

The DER static data must be entered in the DER (MG) Form and submitted to the AESO. It can be entered in the form manually or by File upload (Import) using an excel file template. Only one DER's static data can be entered at a time, using the Manual Data Entry method, whereas multiple DERs static data can be uploaded to the portal using File upload method.



3.1 Create by Data entry in the portal

User can enter the DER(MG) resource data manually using the DER data form in the portal that will create a DER record. Only one DER record can be created at a time using the Manual Data Entry method.

Steps to perform enter the DER data manually:

- 1. Sign-In to the DER portal as described in the Sign-In section above.
- 2. Open a NEW record by clicking the '+ New' button on top ribbon. An empty, new DER static data form will open.

\leftarrow	🔚 Save	🗘 Submi	t	🛱 Save & Close	+ New	≫ Flow	\sim			
Ne	ew DER (MG)								
Ge	neral									
F	Project Des	cription								
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	Site Legal	Description	*							
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	Energy So	urce	*							
	Type of G	enerator	·							
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	Interconne	ection Line	*				Substation Number	*		
	Meter Typ	e	÷				Retailer ID	÷		
	Metering Managem	Data ent (MDM)	÷				Load Settlement Agent (LSA)	·		



3. Enter the static data in the form.

User can enter partial data and save the form to return and complete the form later, however, user must fill these 7 fields to be able to save a DER Data record. These fields are marked with a red Asterix (*) on the form.

- I. 13-Digits Site ID
- II. Site Legal Description
- III. Wire Service Provider (WSP)
- IV. Energy Source
- V. Interconnection Line
- VI. Substation Number
- VII. Nameplate Capacity

There are other fields marked with a blue 'Plus' (+) on the form, which are mandatory for submitting the record.

4. Upload SLD/ SLDs for the DER (required for large Micro-generators only).

Click 'Related' tab to open dropdown and select 'Documents'.

← 🗉	📓 Save 📲 Save & Close	+ New	🗋 Deactivat
New DEF	R (MG)		
DER (MG)			
General	Related		
		-	
Project [Related - Common		
A 13 Dig	Documents		
A 13 Dig	Documents	_	
A 13 Dig	 Documents Audit History 	- -	
A 13 Dig	Documents Audit History Related - Process Sessions		

'Documents' tab will open with feature to 'Upload' a document.

🏽 aeso 💿	AESO Apps SANDBOX
=	← 🗄 🖬 Save & Submit 🛍 Save & Close + New 🕞 Deactivate 🖒 Refresh 🔍 Check Access 🗄
 ŵ Home [™] Recent ✓ ✓ Pinned ✓ 	New DER (MG) DER (MG) General Documents Related
CR (MG)s	Document Associated Grid Documents on Default
	✓ Name ∨ Modified ∨ Modified by ∨ Location ∨
	No data available.



Use 'Upload' button to choose file for uploading the SLD document. The 'Overwrite existing files' feature is set to 'Yes' by default, which means the file will be overwritten by the new document if their file name and type is same. The old file will become an older version of the document, which will only be visible to system administrator of the portal at the AESO. If user changes the 'Overwrite existing files' to 'No', then another file will be uploaded with the same file name.

Note: A file cannot be deleted once uploaded. In case, user uploads a wrong file erroneously, they can overwrite it with the correct file. If a user must delete a file from the portal, then they will need to contact the AESO where the system administrator will delete it on their behalf.

R	Show Chart + New \lor $\bar{\uparrow}$ Upload \square Document Location \lor \square Open Location
D B	Document Associated Grid V
	Upload Documents ×
	File Opioad Choose File_ No file chosen Maximum upload limit in Dynamics 365 is 50.00MB. Larger files can be uploaded directly in SharePoint. Overwrite existing files
	OK Cancel

After upload, the uploaded file will be shown under the 'Documents' tab.

New DER (MG) DER (MG)					
General Documents Related					
詞 Show Chart + New ~ 千 Upload	🗅 Document Location 🗸 🖄	Open Location \vee D Add	Location 🖉 Edit Location	✓ ○ Refresh → Flow ✓	
Document Associated Grid $$					
Documents on Default Site 1					
Documents on Default Site 1 Name	Modified \lor	Modified by \bigtriangledown	Location \checkmark	Path ↑ ∨	Source 🗸
Documents on Default Site 1 Items United States - current state.docx	Modified > 2/9/2021 1:41 PM	Modified by ↓ tst-Shuchismita Singh2	Location V Documents on Default	Path ↑ ↓ _987D9856E85AE811A812000D	Source U

3.2 Create by File Upload (Import)

DER(MG) static data for one or multiple DERs can be uploaded to the DER data portal by Importing an Excel data file. File Import will only create the DER(MG) static data records, it cannot be used for any existing record.

The Excel file template for the import option is included in the Appendix.



Steps to perform File Import:

- 1. Enter the data in the template to create the file for Import.
- 2. Sign-in to the DER portal as shown in Section 2.
- 3. Import the data file created using the template. The template is provided in the Appendix.

\leftarrow 🕼 Show Chart + New	🗓 Delete 🗸 🖒 Refresh 🔤 Email a Link 🗸 🔊 Fl	iow 🗸 🗐 Run Report 🗸 🛛	🗑 Excel Templates \vee 🛛 🕼 Export to Excel	│ └ 🖪 Import from Excel └ └
All Active DER (MG) reco	prds \sim			𝕎 Search this view
✓ 13 Digits Site ID ↑ \vee	Nameplate Capacity (kW) AC/DC \checkmark Wire Service Provider (WSP)) > Metering Point Identifie	(MPID) \checkmark Submission Date \checkmark	Modified On \searrow
02000000001	4,999.99 Fortis Alberta	12	1/28/2021	2/24/2021 3:48 PM
10000000003	ATCO Electric			1/20/2021 5:13 PM
10000000004	ATCO Electric			1/19/2021 11:53 PM
10000000005	220.00 ATCO Electric			2/17/2021 5:46 PM

Choose the Import file and click 'Next'.

il) Run Report 🗸	Import from Excel	01	1	×
	Owner For Imported	Records	No file chosen	
ng Point Identifier (MPID)	Select Owner For Imported Records	۶		
N O P			Close	Next

Click 'Finish Import' to complete the import and create the respective DER data records in the portal.

Note: Do not change any Import settings when importing the data File.

I Due Demost V	Import from Excel ×
	(i) You're about to import test upload .xlsx 16 KB Import Settings Alternate Key
g Point Identifier (MPID)	Select An Alternate Key
	Allow Duplicates No
N O P	Back Review Mapping Finish Import



On the next screen click 'Track Progress' to track the progress of processing the imported records or, alternatively, simply click 'Done'.

🏾 aeso 🌑	AESO Apps SANDBOX Import from Excel	×
≡	← 🕅 Show Chart + New 🕐 Refresh 🛛 🛱 Email a Link Vour data has been submitted for import	
ය Home	Active DER (MG) records – with all fields for Da	
() Recent		
A Pinned	Actual in-s V Interconne V Substation V Meter Type V Retailer ID	
	1/15/2021 L2000210 Sub 20002 Interval	
DER (MG)	1/29/2021 L 002A2 SUB 2 Interval	
🗱 DER (MG)s		
🔀 Wire Service Provider	^{IS} <u>All</u> ≠ A B C D E F G H I J K	Dono
	1 - 4 of 4 (0 selected)	Done

On selecting 'Track Progress', the progress status of the upload can be viewed by refreshing the web page frequently. Double click on the records shows the details of an import. The data import shall be complete in half a minute but can take few minutes sometimes.

Note: The progress of file import will not be viewable if user clicks 'Done'.

AESO Apps						
- 🖾 Show Chart 🗳 Delete 🗸 🖒 Refres	h 🖪 Export to Excel 🛛 🗸					
My Imports ~						
✔ Import Name ∨	Status Reason \checkmark	Successes \lor	Partial Failures \lor	Errors \lor	Total Processed	\sim
New DER(MG) Import Template-v1.0.xlsx	Parsing		0	0	0	
New DFR(MG) Import Template-v1.0 xlsx	Completed		1	0	1	

Details of failure to import a record can be viewed under the 'Failure' tab.

aeso

est upload .xlsx mport Source File Seneral Failures Success Partial Failure Related					
🛆 Name	test upload .xlsx	🛆 Status	Completed		
☐ Created By	A Shuchismita Singh				
☐ Created On	3/9/2021 🛗 11:50 PM	☐ Finished On	3/10/2021		
Properties					
🛆 File	test upload .xlsx	🛆 Size	21456		
A Record Type	aeso_der	🗄 Мар			
A Records Owned By	A Shuchismita Singh	A Duplicate Detection	Yes		
Results					
☐ Successes	3	☐ Failures	0		
A Partial Failures	0	🛆 Total	3		

4. View the newly created DER data records, for each DER, on the portal summary page. Double click on the empty spaces in the record to view the details of the record i.e. DER's Static Data.

All Active DER (MO	G) records ∨			Y	Search this view
✓ 13 Digits Site ID ∨	Nameplate Capacity (kW \checkmark	Wire Service Provider (W \vee	Metering Point Identifier \	\sim Submission Date \sim	Modified On \downarrow \checkmark
99999999999903	540.00	ATCO Electric			3/10/2021 12:00 AM
9999999999901	4,999.99	ENMAX			3/10/2021 12:00 AM
999999999992	1.00	ENMAX			3/10/2021 12:00 AM
200000000030	1.00	Fortis Alberta			3/9/2021 12:05 PM

5. Save the form if prompted to do so.



6. Upload SLD/ SLDs for each DER (for large Micro-generators only) record that was created by File Import.

Open each DER records one by one and follow the same SLD File upload steps as mentioned in Manual Data Entry method (Section 3.1).

3.3 Submit DER data

After creating and completing a DER data record in the DER Portal, the DFO user must SUBMIT the data to the AESO. It can be done in two ways:

- 1. Submit one DER data record individually
- 2. Submit multiple DER data records in bulk

The user must fill all the mandatory fields before submitting it to the AESO. The user shall also make sure that all the data is correct because after submission they will not be able to update the data except 'Interconnection Line' and 'Substation Number'. In case a user needs to update any other field, they will need to contact the AESO, and the DER data portal admin will make the change on their behalf. The AESO's DER Admin contact is provided at the end of this document.

Submit DER data – individual form

1. Open the DER record and click SUBMIT button at top of the DER data form.



A confirmation pop-up will confirm the submit action; select SUBMIT.



2. A notification email is sent to the AESO users when a new DER data record is submitted by any DFO.





Submit DER data – multiple records

1. Open the 'All Active DER (MG) records' view to see all the unsubmitted records.

All Active DER (MG) records $\scriptstyle{\smallsetminus}$		
✓ Search views		
\checkmark All Active DER (MG) records		2
All Inactive DER (MG) records		3(
Submitted Active DER (MG) records	Default	

2. Select all the DER records that to be submitted and click SUBMIT at top of the page.

$\leftarrow \mid \mathbf{E}$	🛪 Show Chart 🖉 Edit 🔇 S	ubmit 🖪 Activate 🛛 Dea	ctivate 🛍 Delete 🗸 🗸	🞗 Assign 🖻 Share	🖙 Email a Link Υ Σ	≥ Flow ∨ :	🖄 Shar
All A	ctive DER (MG) records*	· ~			🗔 Edit columns	√ Edit filters	er by keyword
	13 Digits Site ID ~	Nameplate Capacity ($$	Wire Service Provider ${}^{\scriptstyle \vee}$	Metering Point Identif	 ✓ Submission Date ↑ 	Modified On ~	
	4030001286658	4.50				10/23/2024 10:33	
	4030001287837	4.40				10/23/2024 10:33	2
	4030001289767	6.66				10/23/2024 10:33	
	4030001292611	7.00				10/23/2024 10:33	2

Same as individual record submission, a confirmation pop-up will confirm the submit action; select SUBMIT.

- 3. The SUBMIT action runs data validation on the selected records and submit those which have been successfully validated, while holding back the ones which fail the data validation. Same as individual record submission, an email notification is sent to the AESO users.
- 4. A pop-up for successful submission of any record will show as below:



5. If the data validation for any DER record is unsuccessful then a notification will appear at the top which can be expanded to view the details.

	aeso 🕲 🛛 der	✓ Search	SANDBOX + © ?	0
8	You have 2 notifications. Select to view.			~
8	Validation failed: Please review the selected 1 record(s) and	l re-submit.		×
8	Validation failed. Site ID: 4030001289767			×
•	All Active DER (MG) records* \vee		Edit columns 🝸 Edit filters 🔎 Filter by keyword	



4. View and Update DER data

4.1 View DER data within the portal

The DFO users, can only view the DER data that was entered by them. They can view the data at any time using multiple views within the portal.

On the summary page, use the down arrow, as shown below, to select the view.



- **'Submitted Active DER (MG) records':** Only shows the DER Data records that are submitted to the AESO.
- 'All Active DER (MG) records': Shows all the DER Data records (submitted and not submitted to the AESO).
- **'All Inactive DER (MG) records':** Shows all the DER Data records (submitted and not-submitted to the AESO) that were deactivated by any user.
- 'Submitted Active DER (MG) records with all fields for Data Export': Shows the DER Data
 records that have been submitted to the AESO. The records have all the data fields of a DER data
 record that are entered by the DFOs, except for the SLDs. This view should be used to export the
 DER data for further use.

Note: SLDs need to be opened/ downloaded separately from each DER data record for viewing. User can access the SLD from the 'Documents' section in the 'Related' tab.

Each view can be further sorted or filtered as needed by using the down (v) sign beside the field/ column names.

Submitted Active DER (MG) records – with all fiel \vee					
$oldsymbol{v}$ 13 Digi $\uparrow \lor$	Site Legal 🗸	Is it an Ene \lor	ls this an	e 🗸 Existing Ca 🗸	AESO Co
02000000	d123	No	î	Sort A to Z	
11111111	1	No	↓	Sort Z to A	
12000000	12	No	Y	Filter by	1



The view can be further modified, if needed, using Advanced filter i.e. funnel symbol next to Search View.

Ţ	Search this view	Q
Energy Sou $arsimed$ Other	Ener ∨ Type of Ge	∨ Is CSA Anti

	aeso 💿	AESO Apps	Advanced filters ×
=		\leftarrow 🖾 Show Chart + New	and \sim
	Home	Active DER (MG) record	Status Equals Active
\$	Pinned 🗸	 ✓ 13 Digi ↑ ✓ Site Legal ✓ 12345678 sdfgh 	+ Abd ~
DER	(MG)		
63	DER (MG)s	1	
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D(DER (MG)	1 - 1 of 1 (0 selected)	Apply Cancel

4.2 View DER data by File Export

Users can export static data for one or multiple DERs in an excel file.

Steps to export the DER static data:

- 1. Go to the 'Submitted Active DER (MG) records with all fields for Data Export' view
- 2. Modify the view if needed using sort & filter options
- 3. Click 'Export to Excel' button

÷	🛱 Show Char	t + New	🗓 Delete 🗎	 	🕼 Email a Link Υ - Σ	🔊 Flow 🗸	🗊 Run Report $~ \checkmark$	🖷 Excel Templates	✓ Kat Export to	Excel	~ :
	Submitted A	ctive DER	(MG) record	ds – with all f	iel ~					Y 9	search this view
Ŀ	✔ 13 Digi ↑ ∨	Site Legal 🗸	Is it an Ene \lor	Is this an e \lor E	kisting Ca $ee $ AESO Conn ee	ls Aggregat	ee Wire Servic ee Ene	rgy Sou $arsigma $ Other Ener.	∨ Type of Ge ∨	ls gener	ato $ee $ Actual in-s ee
	02000000	d123	No	Yes		No	Fortis Alberta Wi	nd	Synchrono	No	
	11111111	1	No	Yes		No	City of Lethbric Wi	nd	Inverter-b	No	2/24/2021
	12000000	12	No	Yes	1	No	ATCO Electric Ot	ner !2	Synchrono	No	2/10/2021
	12312312	12321321	No	Yes		No	ATCO Electric Co	mbined	Synchrono	No	2/23/2021

- 4. The downloaded Excel file will be available in the 'Downloads' folder.
- 5. User can refine their export using some other options within 'Export to Excel'



Note: The associated SLDs cannot be exported to an excel file hence, if needed, they should be downloaded separately from each DER data record's 'Documents' section under the 'Related' tab.



4.3 View or Download SLDs

SLDs can be viewed within the portal or downloaded from the 'Documents' section of the DER data record.

To view SLD:

Open the DER data record > Related tab > Documents > Double click the SLD to be viewed from the list of associated SLDs > the SLD will open in another tab.

To download SLD:

Open the DER data record > Related tab > Documents > Select the SLD > Check Out > the SLD will be downloaded in the 'Downloads' folder.

4.4 Update DER data record

The DFO users can update any data for a DER before it is submitted to the AESO.

After submission of a DER data, the DFO users can only update following data fields:

- Substation Number
- Interconnection Line
- Any document attachments to the DER data record e.g. SLDs

After submission of the DER data, if the DFO users wish to update any field other than the ones mentioned above then they will need to contact the AESO to make the required changes on their behalf.



Updates made to any DER data field triggers an email notification for the AESO users and the users of the concerned DFO to notify the change.



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5. Things to remember

5.1 Supported browsers

The AESO Enterprise Data Portal is supported and tested on Google Chrome browser, hence Google Chrome is the recommended browser for using the portal.

5.2 Sign-up considerations

If you use Office365, please use your cloud credentials in the email field. If you are unsure about what these are, please check with your IT support team to verify the correct credentials to use.

For security reasons, you must sign-up with your individual email. If more than one-member sign-up for a DFO then all will be able to see the records for that DFO irrespective of who created it but only the creator of the record will be notified on record update.

It is recommended that there should be at least two users from each DFO to be able to fill in for other's absences.

5.3 Save DER Static Data record

When entering data manually in the form, a DFO user can enter partial data and save the form to return and complete the form later. However, to be able to save the DER static data record they must fill the following 7 fields. A list of mandatory and optional fields is provided in the Appendix.

- I. 13-Digits Site ID
- II. Site Legal Description
- III. Wire Service Provider (WSP)
- IV. Energy Source
- V. Interconnection Line
- VI. Substation Number
- VII. Nameplate Capacity

5.4 SLD File upload and download

An uploaded SLD (or any file) cannot be deleted. In case, a wrong file is uploaded erroneously, it can be overwritten with the correct file. If the uploaded file must be deleted from documents tab section, then DFO user will need to contact the AESO where the system administrator will delete the file for DFO.

SLDs or any attached document cannot be exported to an excel file hence, they should be downloaded separately from each DER data record for viewing.

5.5 Submit DER Static Data record

After DER static data submission, a DFO user cannot update the data except 'Interconnection Line' and 'Substation Number'. It is important to make sure that all the data is correct before submitting it to the AESO. In case any data, other than the 'Interconnection Line' and 'Substation Number' needs to be changed, then DFO user will need to contact the AESO where the system administrator will delete the file for DFO.

5.6 File Import

DER static data record cannot be updated by File Upload. To update the record, the DFO user must open the record in the portal and change it manually.

The DFO user shall not change any Import settings when importing the data File.



5.7 Notifications

The email notifications will be system generated, hence the DFO users shall not reply to the emails. In case of any queries, they can write to the email ID provided in the notifications.

The DFO users will need to ensure that the system generated emails are not marked as spam to receive timely notifications. The sender ID for system generated emails is provided in the Appendix.

5.8 Select record not blue text

To open a record, do not click on any blue text within the record. The Blue text in the portal is a link to that entity and clicking that will open information on that specific entity not the record. To open a record, user must avoid the blue text, instead double click the black text or empty space in the record. E.g. in the screen shot below click on the area covered by green box to view DER data details. Clicking on the red box will open WSP entity details.



5.9 Sign-up turnaround

Sign-up turnaround time is dependent on the AESO's DER data portal admin's approval. It can take up to 2 days if the request is received on a weekend.

5.10 Portal Availability

The DER Data portal should be accessible by the user 24x7, 365 days. However, the support will be available only during normal business hours.

In case of unavailability of the Portal, the user can contact the AESO contact provided in the appendix and the AESO IT will try to assist asap. In cases that the unavailability is caused by Microsoft outages, the user will need to wait for the service restoration by Microsoft. The AESO will try to notify users through public announcement on its website (www.aeso.ca), as soon as it becomes aware of the outage.



Appendix

A. Abbreviations

- AESO Alberta Electric System Operator
- DER Distributed Energy Resource
- DFO Distribution Facility Owner
- MG Micro-Generation
- MST Mountain Standard Time
- SLD Single Line Diagram
- WSP Wire Service Provider

B. Template for file upload

Please use the <u>DER(MG) Static Data Import Template</u> to create multiple DER(MG) static data records at once using file import process.

C. AESO contact

Users can contact <u>D-AESODERAdmin@aeso.ca</u> for any questions about this user guide, or support needed in using the portal.

D. Sign-Up or Sign-In URL Portal URL

• After go-live - <u>https://aeso-portal.powerappsportals.com/</u>

E. Email notifications

To receive timely notifications, the DFO users shall take care that the emails from following sender is not marked as spam.

• <u>svc-azure_aesoportal_notify@aeso.ca</u>.