

Customer Connections Portal User Guide – Communication Channel

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About This Guide

The 'AESO Enterprise Data Portal' is a suite of online portals meant to provide a unified platform for secure information exchange with external stakeholders. The 'Customer Connections Portal' is part of that suite, meant for exchange of data related to the Connection, Behind-the-Fence, and Contract processes. This guide is specific to the Project Data Update Package (PDUP) submission process. The Transmission Facility Owners (TFO) and market participants (MPs) will use this portal at different stages of a project to submit PDUP to the AESO.

This document will provide guidance on:

- How to use the **Communication Channel** feature in the portal

Note: *In this document, the Customer Connections Portal will be referred to as CGA Portal or Portal. Screenshots have been created using dummy data and users and usernames have been stricken-off for privacy reasons.*

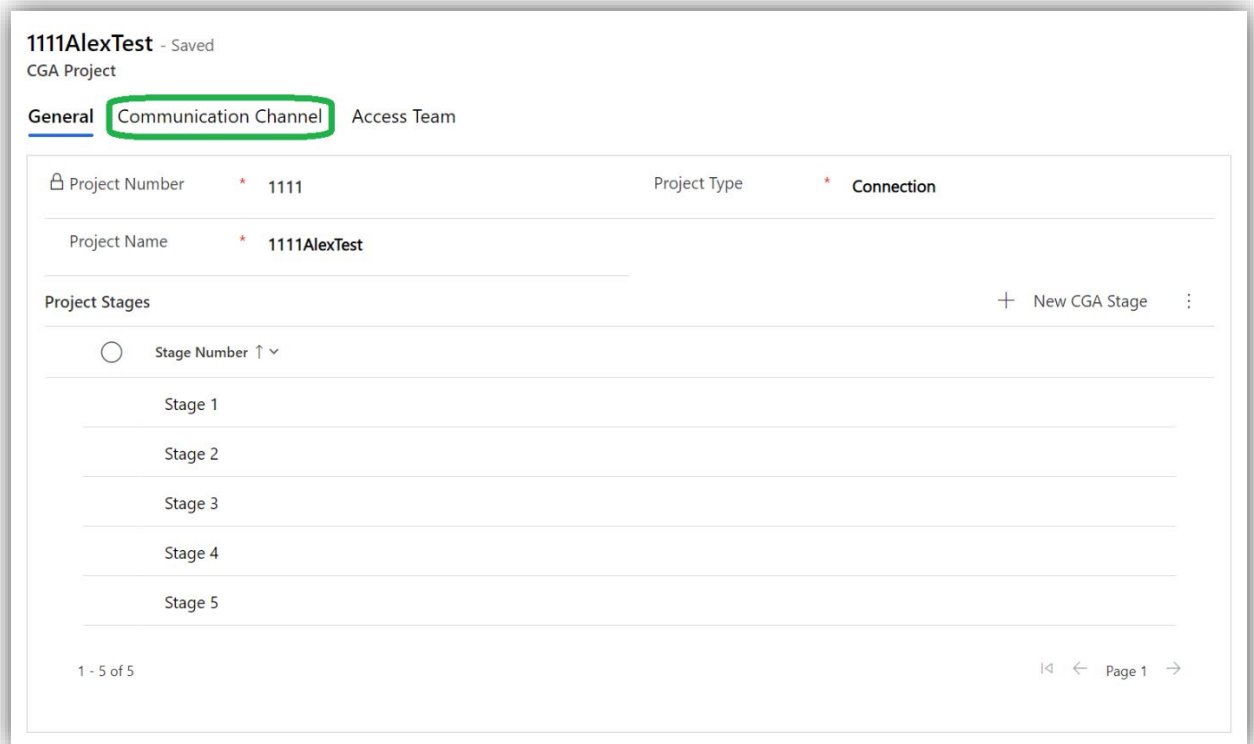
1. Communication Channel

Once a project is created, the users of the portal can use Portal’s Communication Channel, instead of email, with other portal users, for a secure communication regarding the project.

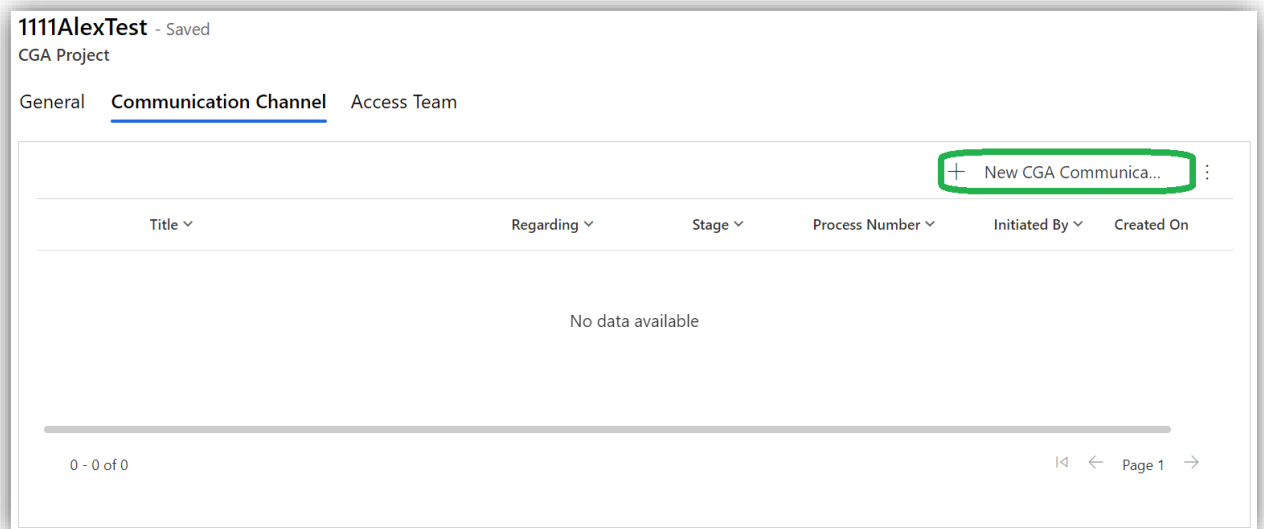
Note that the project’s PM is always copied on any communication with External (non-AESO) User.

1.1. Initiate communication

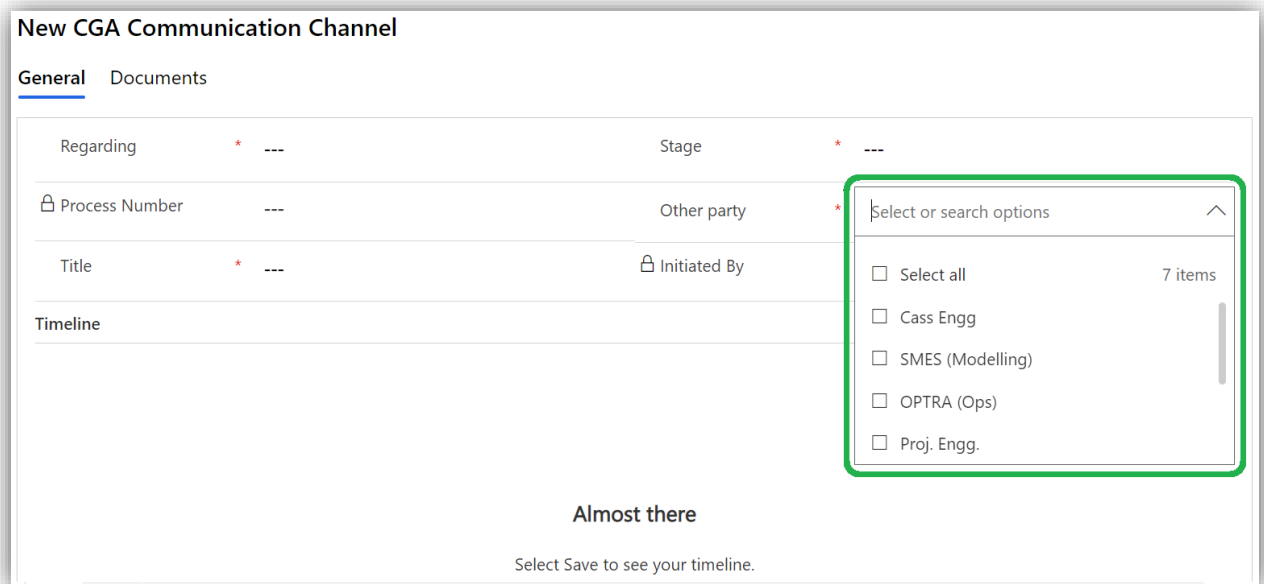
1. Go to the Communication Channel tab in the project



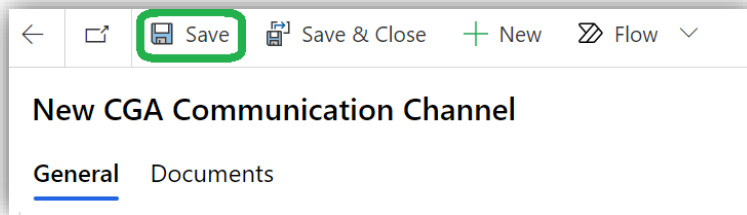
2. Click 'New Communication Channel'



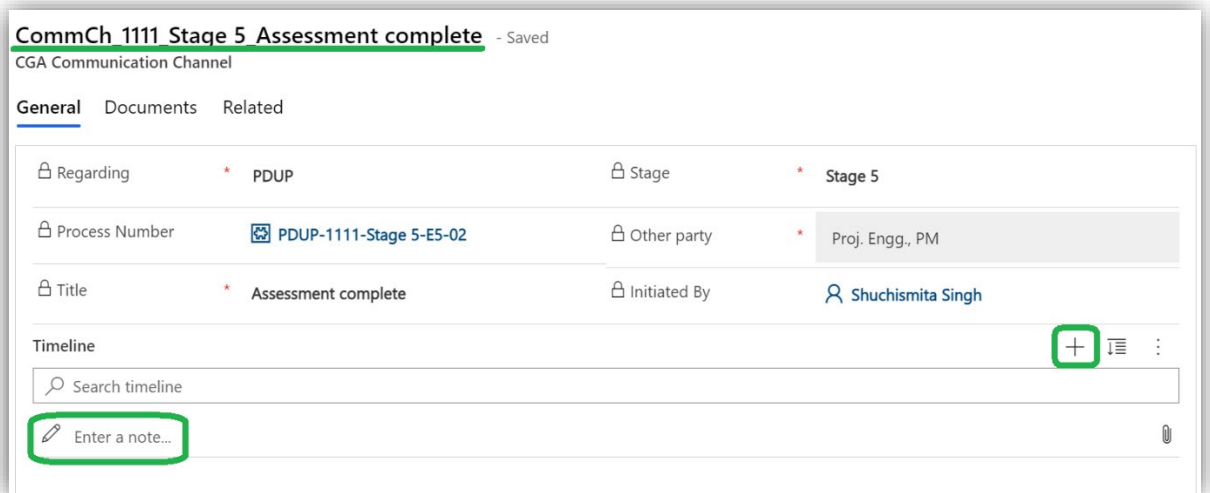
3. A new page will open. Enter the required fields in the form.
- Regarding – The process, the communication relates to
 - Stage – The stage for which the communication is applicable
 - Process Number – The reference no. of the process
 - Other party – Select the receivers of the communication
 - Title – Provide the subject of the communication



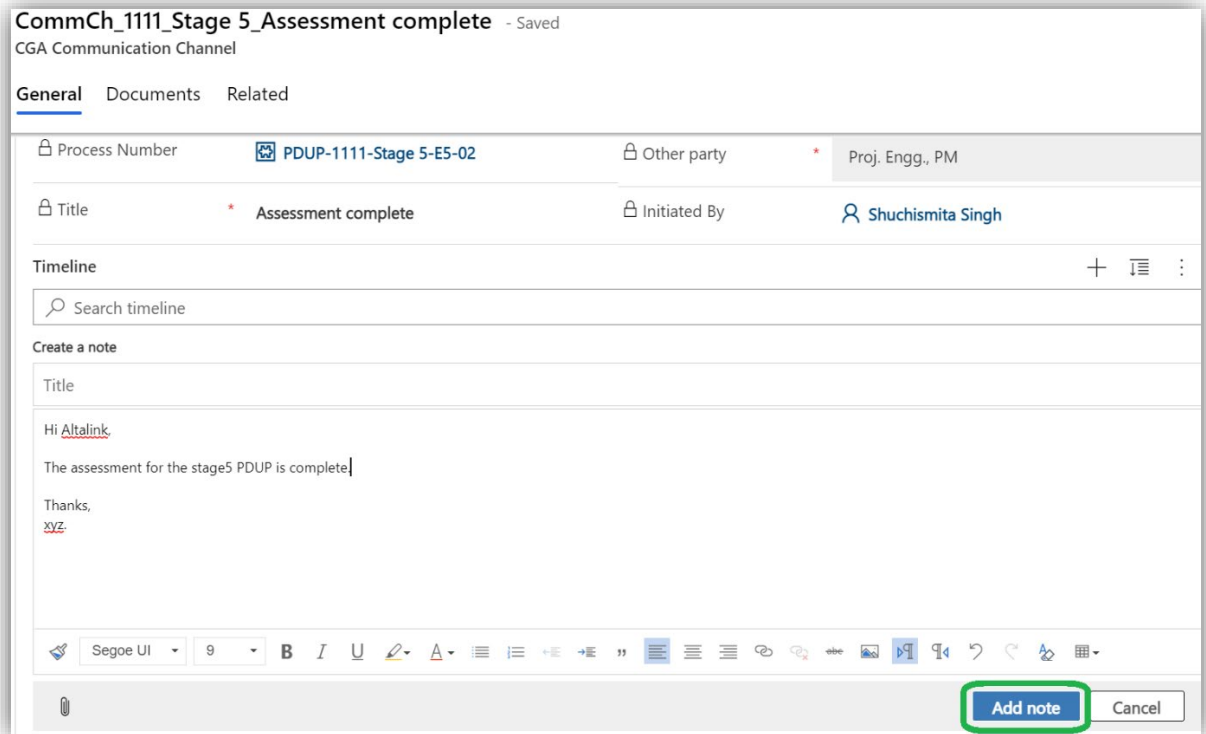
4. Click 'Save' at the top of the page to Initiate the communication.



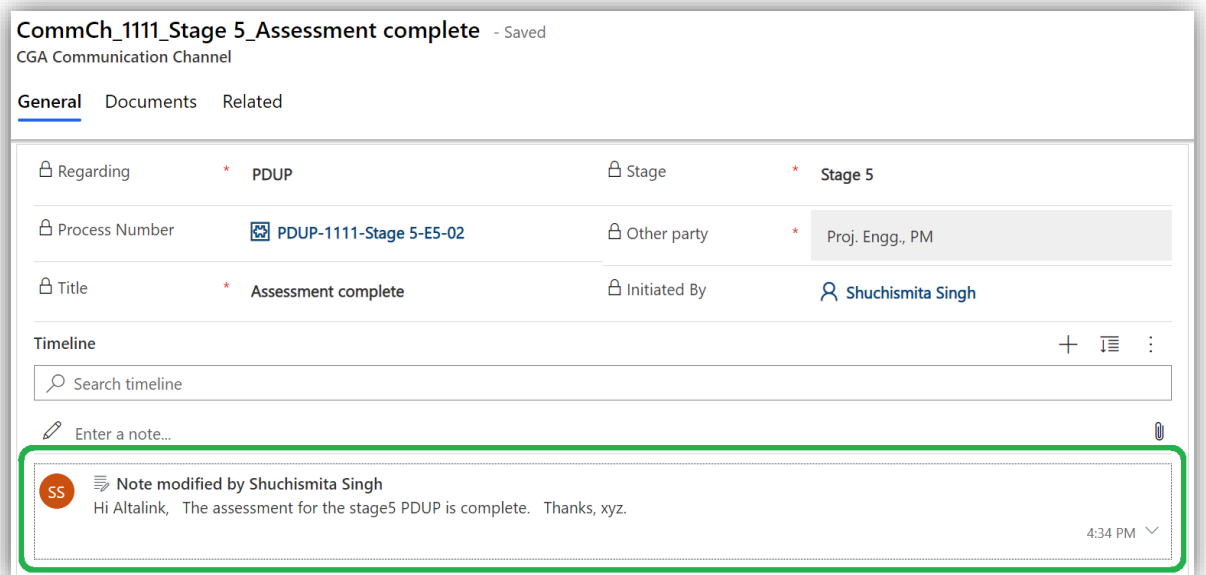
5. 'Save' will establish the communication channel between the sender and receiver and assign a reference no. to it. The page will get the Subject name on top and ready to accept the matter (notes) of the communication.
6. Click the '+' or 'Enter a note' to add matter (note).



- A field to add content will open. Enter the communication text as note and click 'Add Note' at the bottom of the page. Adding 'Title' for the notes is optional.



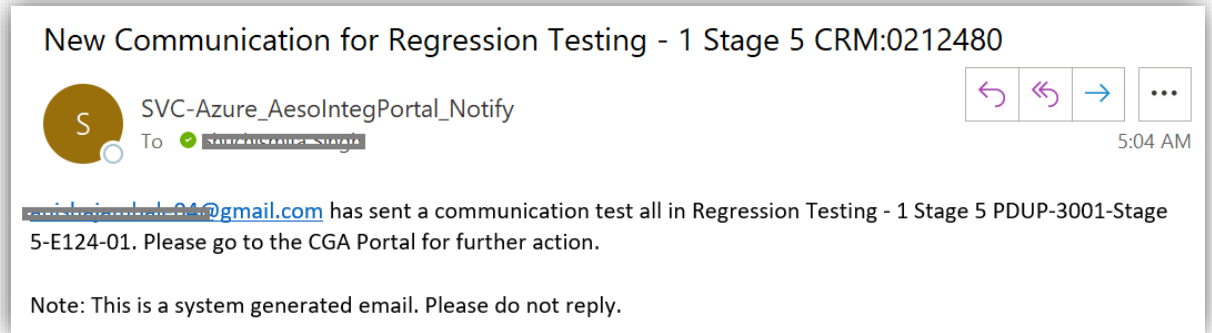
- The content will show as a note on the page with its timestamp. User can use the downward arrow 'v' next to timestamp to expand and view the full content.



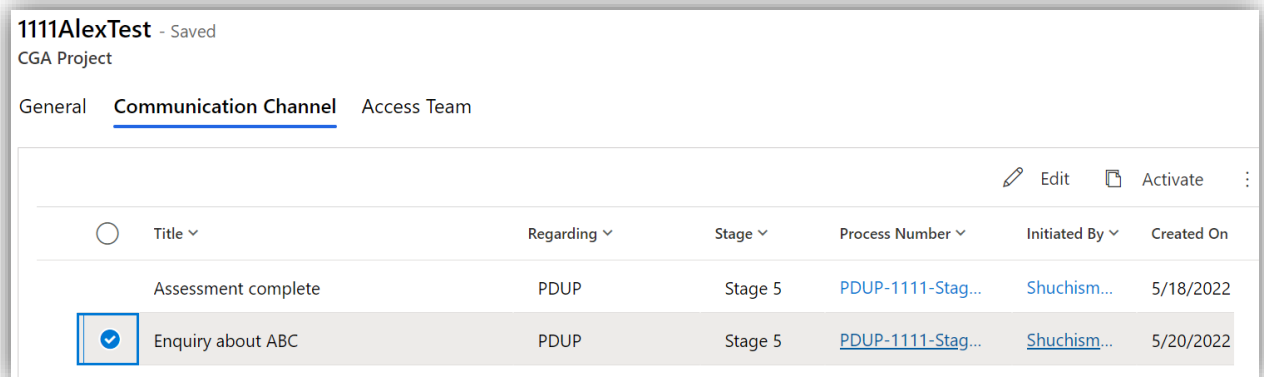
- 'Add note' will also trigger an email notification for the individuals receiving the communication.

1.2. Receive communication

1. When user receives a communication then they will get a notification in their inbox, as below.



2. Go to the Communication Channel tab in the project and double-click to open the communication.

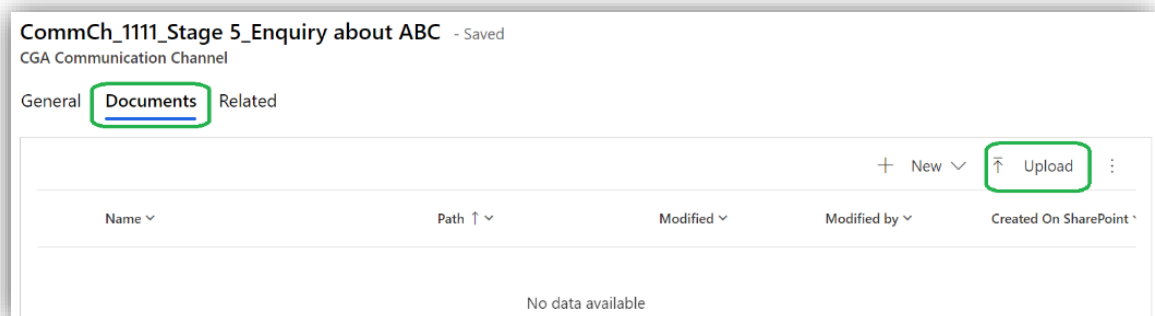


3. Read the note on the timeline.
4. Reply to the communication by 'Enter a note' (see 1.1 step 6) or attach a document (see 1.3) as needed.

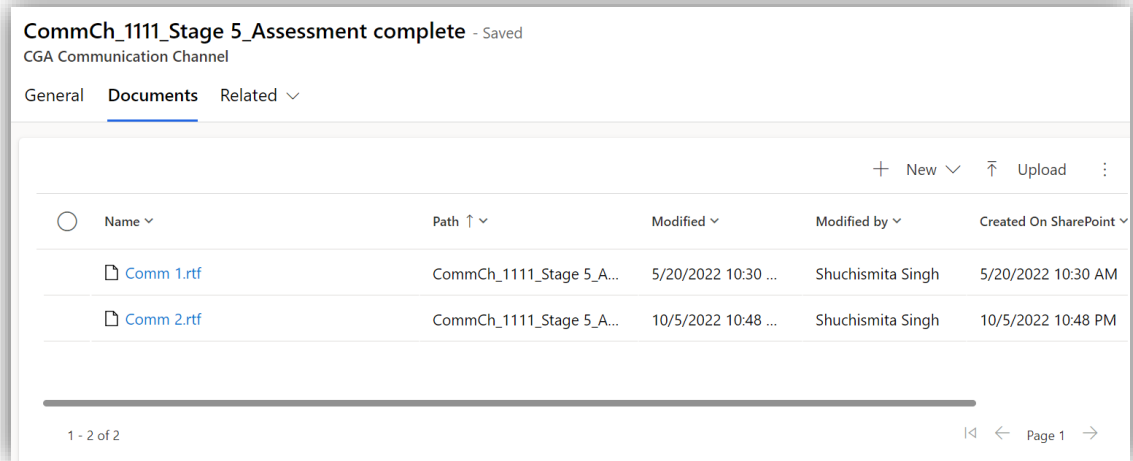
1.3. Upload & view document to the communication

Users can also exchange documents as attachment to the communication channel.

1. Go to the 'Documents' tab within an already initiated communication and upload the document.



- Any attached document will be shown under the 'Documents' tab with communication as a record.



- Double click on the attached document record to open and view it.

2. Appendix

2.1. Abbreviations

- AESO – Alberta Electric System Operator
- CGA – Customer Grid Access
- PDUP – Project Data Update Package
- PM – Project Manager

2.2. AESO Contact

Users can contact customer.connections@aeso.ca for any questions about this user guide, or support needed in using the portal.

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

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

2.4. Email Notifications

To receive timely notifications, the portal users shall take care that the emails from following senders are not marked as spam.

- After go-live - svc-azure_aesoportal_notify@aeso.ca.

3. Revision History

Revision	Date	Comments
1.0	Dec 06, 2022	Initial version