

# Customer Connections Portal User Guide – Sign-Up and Sign-In

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**Classification:** Public

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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 PDUPs to AESO.

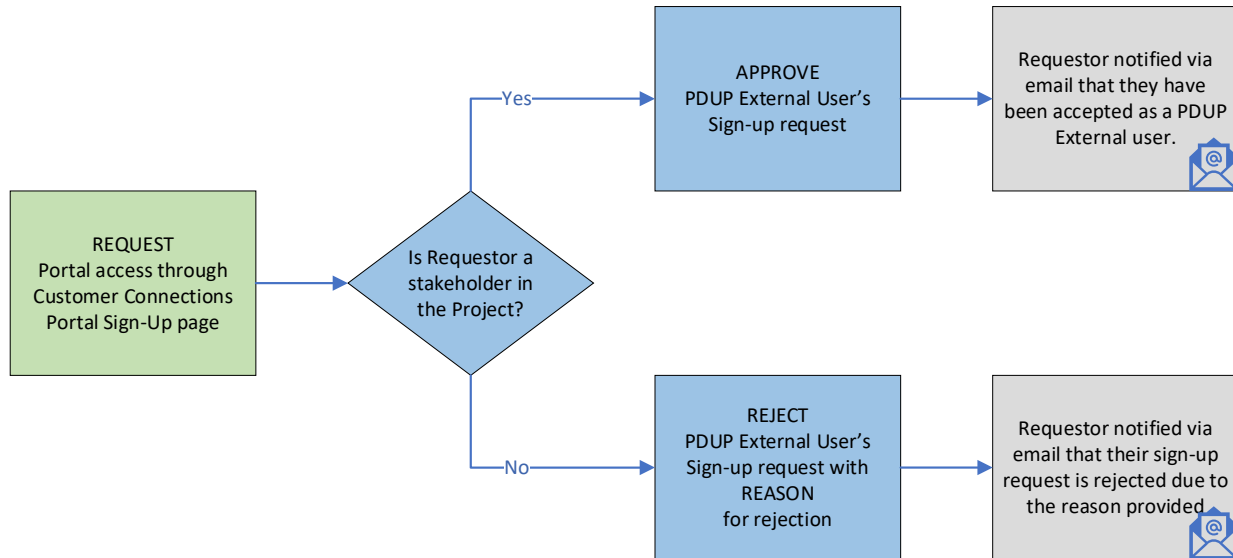
This guide is currently for users of the 'Customer Connections Portal', who are responsible for PDUP. The document will provide guidance on:

- **Sign-Up**, to be a portal user
- **Sign-In**, to make PDUP submissions to AESO

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

# 1. Sign-Up

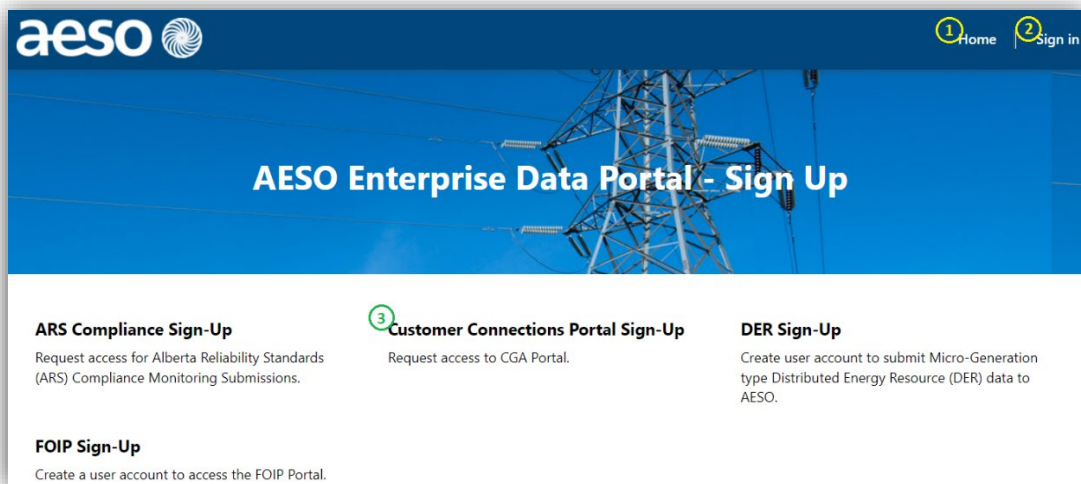
The TFO or MP contacts that are responsible for PDUP submissions can request access to the portal via the sign-up process. The AESO’s Project Manager (PM) of the project will confirm the validity of the sign-up request based on the expected project stakeholders and approve the external user access. Due to the verification process, the sign-up turnaround time is dependent on when the request is approved by the PM, following which the requestor accepts Microsoft invitation.



## 1.1. Request Sign-Up

Steps to sign-up for the Customer Connections portal:

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



As per the above screenshot,

- 1- Home – Homepage as shown above
- 2- Sign-In – brings up the Sign-In page
- 3- Customer Connections Portal Sign-Up – link to the sign-up form for Customer Connections Portal

2. Click on the Customer Connections Portal Sign-Up link, which will open an empty sign-up form:

**Customer Connections Portal Sign-Up**

Only stakeholders that are associated with an AESO Connection, Behind-the-Fence, or Contract project can request access to the Customer Connections Portal.

Project \*

Access For \*  
PDUP

Company Name \*

First Name \*

Last Name \*

Phone \*  
Provide a telephone number

Email \*

Reason for requesting AESO Portal Access \*

ZR6YCDD  
Generate a new image  
Play the audio code  
Enter the code from the image

Submit

3. Complete the sign-up form, click 'Submit' button at the bottom of the page.

- 3.1. Project – Search and select the project for PDUP submission. Make sure the project number is correct as the project name can change during the project, but the number will not.

Lookup records

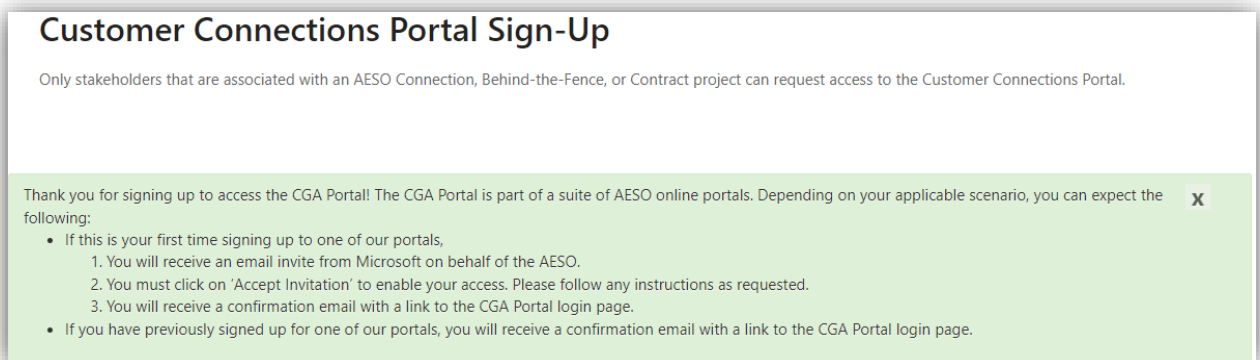
Search

Project Name	Project Number	Created On
<input type="checkbox"/> 1500	1500-Clone	4/7/2022 3:32 AM
<input type="checkbox"/> 0	0	3/14/2022 3:21 AM
<input type="checkbox"/> 00	00	3/14/2022 3:22 AM
<input checked="" type="checkbox"/> 1800 test	1800	3/1/2022 11:03 PM
<input type="checkbox"/> 2 TEST	2	3/14/2022 1:12 AM
<input type="checkbox"/> 2022-Test-Notification	2022-11	4/12/2022 6:38 AM
<input type="checkbox"/> 6	TEST pdup	3/14/2022 3:11 AM

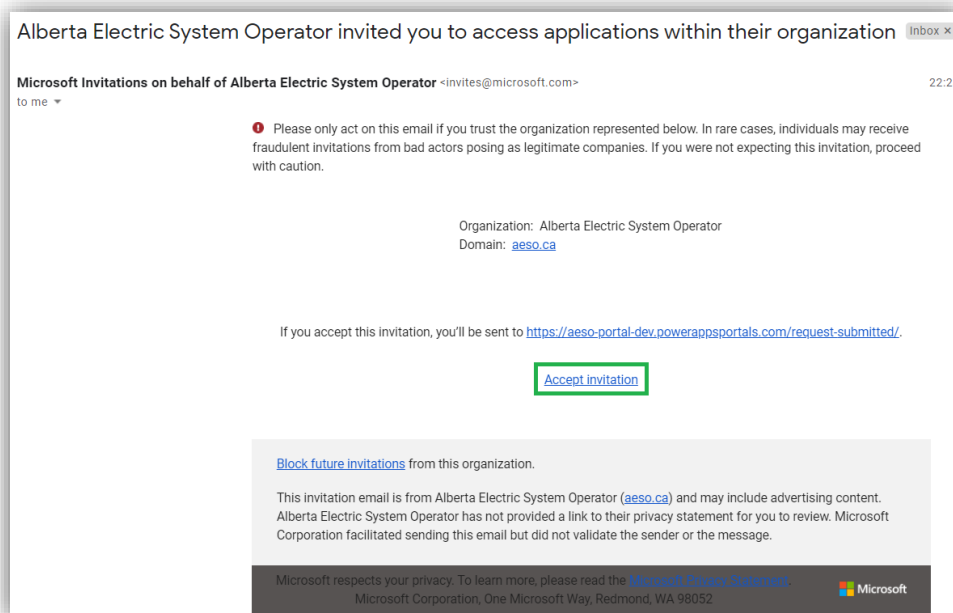
1 2 3 4 5 >

Select Cancel Remove value

- 3.2. Access for – Select the name of the process that you need the access for i.e. PDUP.
- 3.3. Provide your name, company name and contact details. Make sure that you use your official email as that will become your username to access the portal.
- 3.4. Provide reason for requesting access e.g. PDUP submission for Project #####.
- 3.5. Fill the captcha.
- 3.6. Hit 'Submit' button.
- 4. The sign-up request is sent to the AESO's PM and a submission successful message will be displayed on the page with details of what to expect next, as shown, below.

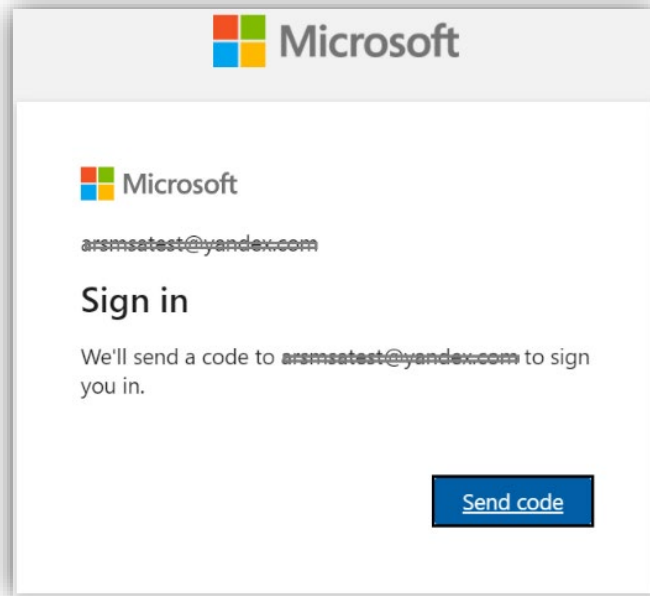


- 5. If the access is 'Approved' by the PM, then,
  - 5.1. The applicant will receive a Microsoft Invitation email, on behalf of the AESO to be included in the AESO's Azure Active Directory. The applicant must 'Accept Invitation'.

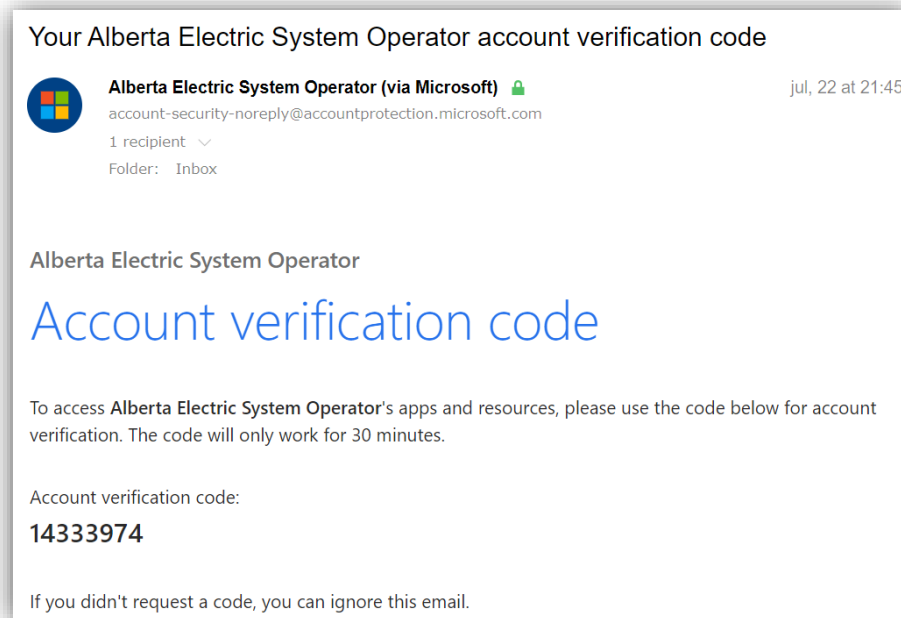


- 5.2. 'Accept Invitation' will take user to either of the two pages mentioned below depending on Microsoft verification:

5.2.1. If Microsoft does not trust the email domain, then a Microsoft Sign in page for code verification will appear.

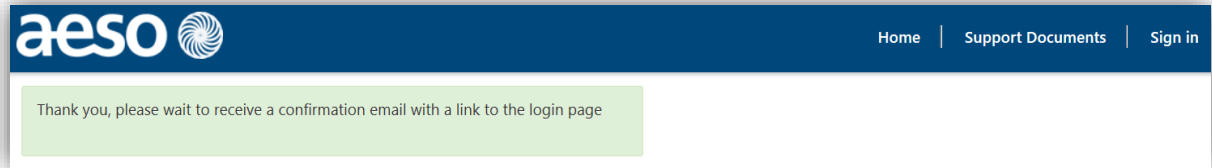


The applicant will need to follow the steps to confirm the email by sending code. An example of an 'Account verification code' email is given below.

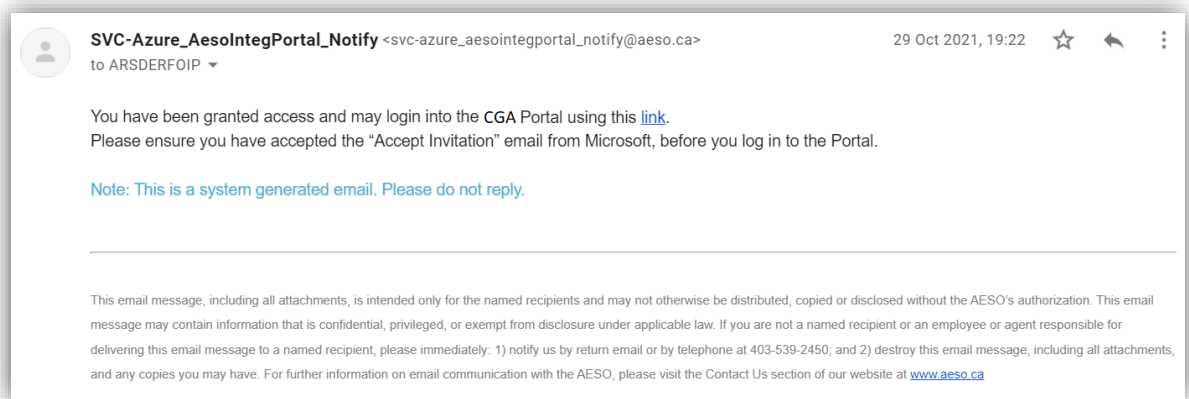


After account verification is complete the page mentioned in 5.2.2 will be displayed.

5.2.2. If Microsoft trusts the email domain, then the user will be directed to a page instructing user to wait for 'Access approved' confirmation email in their mailbox.



5.3. The applicant will then be approved to be a Customer Connections portal user and will receive a confirmation email with link to the sign-in. Once you have received the below email, access has been granted and you may access the Portal using the "Sign in" button on the right corner of the webpage. The confirmation email will look like this:



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



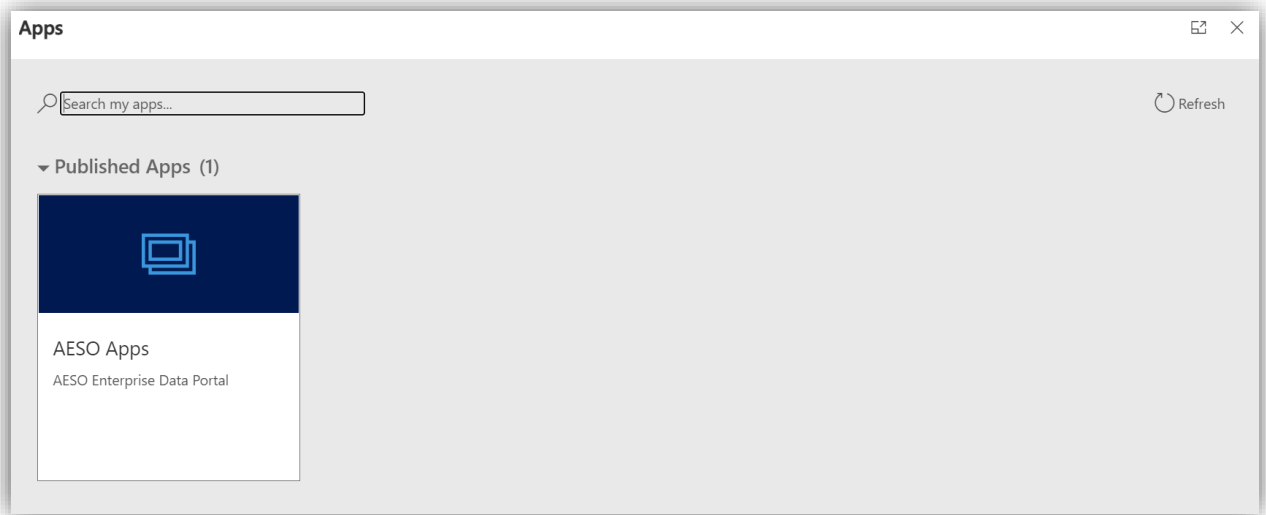
**Note:** If the user is working on more than one Project, they will need to sign-up multiple times to get access to each of those projects i.e., Repeat steps 1 to 6 under section 1.1.



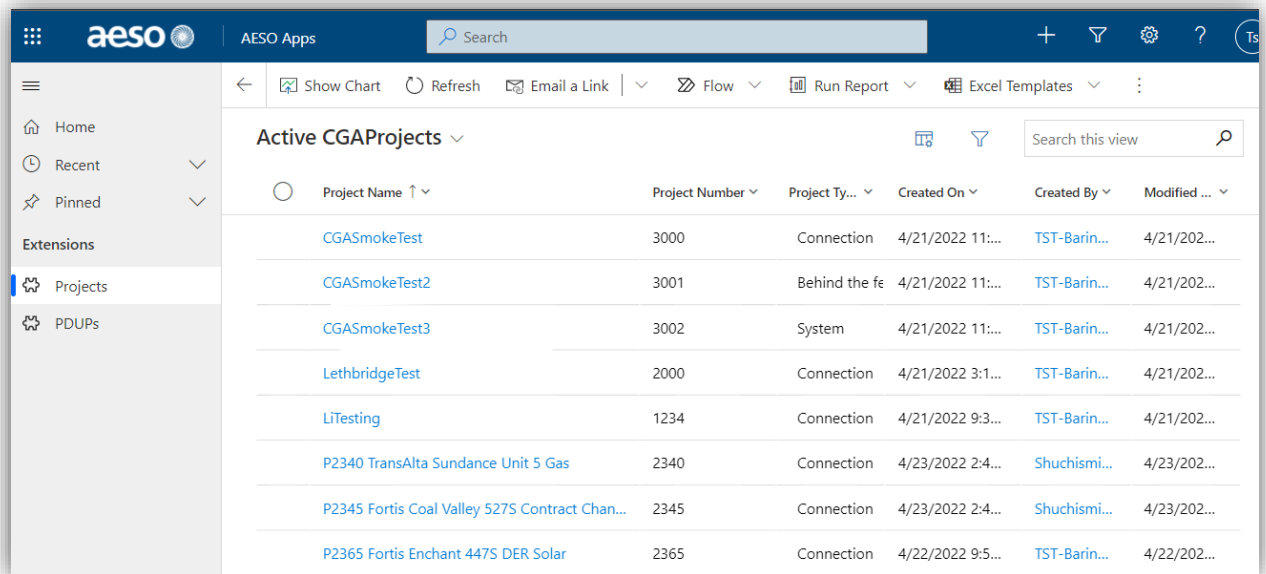
## 2. Sign-In

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.

On sign-in, user will see this landing page:



Click on 'AESO Apps' box will take user to the Summary view of all Active Projects that the user has signed up for.



## 3. Appendix

### 3.1. Abbreviations

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

### 3.2. AESO Contact

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

### 3.3. Sign-Up or Sign-In Portal URL

- <https://aeso-portal.powerappsportals.com/>

### 3.4. Email Notifications

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

- [svc-azure\\_aesoportal\\_notify@aeso.ca](mailto:svc-azure_aesoportal_notify@aeso.ca).

## 4. Revision History

Revision	Date	Comments
1.0	Dec 6, 2021	Initial version