

Standards Balloting and Commenting System (SBS)

Login, Registration, Validation, and Permissions

April 11, 2014







Register/Request Additional Permissions Voter and Proxy



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- Container for services shared amongst the ERO Enterprise line of business applications
 - BESnet
 - SBS
- Authentication is the current service provided
 - Validation of registrant's account information



Role	ERO Platform Account Required	Additional Permissions Required?
Guest/ Anonymous User	Νο	Νο
Contributor	Yes	Νο
Proxy	Yes	Yes
Voter	Yes	Yes

Roles and Permissions

Certain roles require an ERO Platform account along with requesting additional permissions to perform Standards Balloting activities.

- Guest: view/read only access to SBS Dashboard links
- Contributor: individual who can comment on proposed Standards
- Proxy: individual authorized to cast a vote on behalf of the RBB Member and comment on proposed Standards
- Voter: Registered voting member of the NERC Registered Ballot Body for the purpose of casting votes and commenting on proposed Standards



Additional Information

Role	ERO Platform Account Required	Additional Permissions Required?	
Contributor	Yes	Νο	
Proxy	Yes	Yes	
Voter	Yes	Yes	

Roles and Permissions

- Once you have registered for the role of **Contributor** you can begin to comment via 'Take Survey' and use the 'Social Survey' tool.
- Once you have the role of Contributor, you can register to become a Voter or Proxy. You will be able to comment via 'Take Survey' and use the 'Social Survey' tool while your RBB request is being vetted by NERC staff.



Accessing SBS

- SBS URL <u>https://sbs.nerc.net/</u>
- <u>Balloting and Commenting Page</u>

Casting a vote in the new SBS:

 All current NERC Registered Ballot Body (RBB) members must go through a new registration process. If you have not registered or are a new member requesting membership in the RBB, please <u>click here</u>.
 Please access the Standards Balloting and Commenting System Tutorial below for instructions or the Frequently Asked Questions document for assistance.



Login/Register

Guest User Dashboard:

ERC Balloting Tool	Dashboard	Users •	Ballots -	Surveys •	Legacy SBS	Login / Register
DASHBOARD						
NERC Stand	ards B	alloti	ng Sy	/stem		
Welcome Guest User,	your Role is	s Guest				
Please use the links below, or	the top navigat	tion menu to	navigate the	NERC Standa	rds Balloting Syster	n Website.
Users						
Registered Ballot Body Proxy Ballot Body My User Profile						
Ballots						
View Ballots Events Ballot Results						
Surveys						
View Surveys						
Other						
Legacy SBS						

Registering for an ERO Platform Account

From the Standards Balloting System Dashboard, use the link in the upper right-hand corner of the top navigation to create a new ERO Platform account.

If you already have an existing ERO Platform account use your credentials to login.

6

Create an account first and login to request additional permissions to perform Standards Balloting activities.



Create an Account

Register

Welcome to the SBS balloting Tool. To Create an Account click the button below. You will be redirected to SBS account management.

Create an Account

Register to Create an Account

Select "Create an Account" to request additional permissions to perform Standards Balloting activities.



	ERO Platform	
Sign-In » Create Account		
User Name(Email Address)	someuser@power.com	
Password	•••••	
Confirm Password	•••••	
First Name	John	
Last Name	Doe	
Title	Engineer	
Phone	555-123-4567	
Email	someuser@power.com	
Password Question	What was your childhood nickname?	~
Password Answer	Johnny	0

Verify



Create

User name must be a valid email address. Password must be 8 characters long, contain one upper case letter, and one numeric character.

Create an ERO Platform

Account

Complete all of the required fields*

- *User Name enter valid business email address
- *Password password must be 8 characters long, contain one upper case letter, and one numeric character.
- *Confirm Password re-enter password
- *First Name enter first name
- *Last Name enter last name
- *Title (Optional) enter title
- *Phone enter phone number
- *Email enter valid business email address
- *Password Question select a security question
- *Password Answer enter password answer

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Verify Account – Part I

ERO Platform

Sign-In » Create Account

User Name(Email Address)	Freeman@test.com	
Password	•••••	
Confirm Password		
First Name	Freeman	
Last Name	Test	
Title	QA	
Phone	000-000-0000	
Email	AvianceFreeman@gmail.com	
Password Question	What is the name of your favorite childhood friend?	
Password Answer	Ashley Click the food	* ***) C
Verify	Click here.	re
	Create	cation

User name must be a valid email address. Password must be 8 characters long, contain one upper case letter, and one numeric character.

Verify Account – Part I

 SELECT the Verify icon, several images display.
 SELECT the correct image of each description as instructed until all three pictures have been verified.

Upon successful verification, SELECT "Create" to create your account.



Verify Account – Part II

ERO Platform

Sign-In » Verify Account

Thank you John Doe. Your account has been provisioned, and an activation email has been sent to the provided email address.

Resend Validation Email

Verify Account – Part II



Upon successful verification, a verification email will be sent to the email account used to create your user account. Upon verification you will be able to access your account with preliminary permissions.



IMPORTANT: The activation email provided for validation expires after 10 minutes if not used.

SELECT the Resend Validation Email to have the activation email sent to the email address provided.



Verify Account – Part II

Hello Freeman Test

You are almost done with your ERO registration. Please click the link below to validate your email address and complete the registration process.

https://nercbestestid.intellinet.local/UserSelfService/PinValidation/ValidatePin?PinValidationType=RegistrationVerification

You will also be asked to enter the following pin. Please follow the instructions provided at the website.

Your confirmation pin is 26817612

* Please note that the provided pin will expire shortly. It is important to complete this final step immediately. For more information or assistance, please contact the NERC ERO Support team. or call <u>404-446-2560</u>. 3353 Peachtree Road NE Suite 600, North Tower Atlanta, GA 30326 <u>404-446-2560 | www.nerc.com</u>

Verify Account – Part II

Upon successful verification, a verification email will be sent to the email account used to create your user account. Upon verification you will be able to access your account with preliminary permissions.

IMPORTANT: The activation email provided for validation expires after 10 minutes if not used.



ERO Platform

Verify Pin

	UserName Pin	Freeman@test.com 26817612
•		Submit
ŀ	Reset And Reser	nd Pin

Verify Account – Part II

Enter your username and confirmation pin found in the system generated email.

SELECT Submit.

Upon verification you will be able to access your account with preliminary permissions.



ERO Platform - Applications

ERO Platfor	m to Application Sign Out
Applications <u>BES Exceptions</u> SBS 	User Profile
• NERC	User Name: voter8@awl.com
 <u>No Backslash</u> 	First Name: Voter 8
	Last Name : Test
	Title :
	Phone: 555-5555
	Email: felicia.walker@nerc.net
	*Profile changes will not take effect until you logout and log back in. Save
	Password
	Change Question and Answer Change Password

ERO Platform – Select Application

SELECT the application that you wish to access or request additional permissions.



Login/Register

User Dashboard:

DASHBOARD				
NEDC Standarde D	allating S	(ctom		
Welcome Guest User, your Role is	s Guest	Stem		
Please use the links below, or the top navigat	ion menu to navigate the	NERC Standar	ds Balloting Syst	em Website.
Users				
Registered Ballot Body Proxy Ballot Body My User Profile				
Ballots				
View Ballots Events Ballot Results				
Surveys				
View Surveys				
Other				
Legacy SBS				

After selecting SBS in ERO Platform

After you have selected SBS in the ERO Platform (see previous slide) the SBS Dashboard will be viewable.

Select 'Login' and your User Name and Role will automatically display.



SBS Dashboard – Request Permissions



N	ERC Balloting Tool	Das	iboard	Users▼	Ballots▼	Sur	veys▼	Lega	xy SBS
	DASHBOARD			Registere Proxy Ba	ed Ballot Body llot Body Profile				
				IVIY USEI	FIUIIIE				

NERC Standards Balloting System

Welcome Another test, your Role is Contributor

Please use the links below, or the top navigation menu to navigate the NERC Standards Balloting System Website.

Users

Registered Ballot Body

Proxy Ballot Body My User Profile

Ballots

View Ballots Events

Ballot Results

Surveys

View Surveys

Other

Legacy SBS

SBS Dashboard– Request Additional Permissions

After creating an account, logging in and navigating to the SBS Dashboard, your role will be set to default to Contributor role permissions.

SELECT the My User Profile link from the Dashboard or top navigation to request additional Standards Balloting System permissions.

Additional permissions must be requested prior to being granted access for the roles of Voter and Proxy.



Dashboard

Users -

Ballots -

Surveys •

Legacy SBS

Request Permissions

Request Permissions

SELECT the Click here link to request additional credentials.

User Profile

NERC Balloting Tool

First Name: Another
Last Name: test
Entity:
Segment:
Title: QA
Phone: 000-000-0000
Email: AvianceFreeman@gmail.com
Role: Contributor

MY USER PROFILE

Edit Profile Cancel

Click here to request additional credentials



Click here to request additional credentials

Select Your Role

Contributor: An individual who would like to provide their opinion on proposed Standards and other standards products available for comment using an electronic software tool.

Proxy: The person designated by the original voter of the ballot pool, authorized to place a vote on their behalf.

Voter: A registered voting member of the NERC Registered Ballot Body for the purpose of casting votes on proposed Standards and non-binding polls.

Administrator: NERC Standards Process Administrator

Select your Role	
Voter	
Proxy Voter	
System Administrator	
Request	

Request permissions

After making the selection of your role (Voter, Proxy or Contributor) SELECT Request.



Request Permissions

Select Your Role

Contributor: An individual who would like to provide their opinion on proposed Standards and other standards products available for comment using an electronic software tool.

Proxy: The person designated by the original voter of the ballot pool, authorized to place a vote on their behalf.

Voter: A registered voting member of the NERC Registered Ballot Body for the purpose of casting votes on proposed Standards and non-binding polls.

Administrator: NERC Standards Process Administrator

Voter	V

Select Your Segment	
Select your Segment	
Select Your Entity	
Can't find your Entity? Click here to email your request.	

ERO Platform – Select Application

Voter Request for Permissions:

- 1. Select Your Segment
- 2. Select Your Entity (Parent/Affiliate Listing)
- 3. Request permission
 - If you can't find your Entity name in the Entity listing, select the Click here link to send an email request to the Standards administrator to request to have your Entity name added.

Proxy Request for Permissions:

Request permission



USER PROFILE

Your request for the	Role of Voter has bee	n sent and is in process.

User Profile

First Name: Another Last Name: test Title: QA Phone: 000-000-0000 Email: AvianceFreeman@gmail.com

Role: Contributor

Submit New Request Edit Profile Cancel

Vetting Request Pending

Voter and Proxy requests requires further vetting by NERC Standards Staff.



Within three business days, you will receive notification approving or denying your request to join the Registered Ballot Body.





ERO Platform Validation



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Validation Process



Scenarios that require the validation process

- Initial validation
- Subsequent validations when users log in
 - On a different computer or device (work, home, iPad, iPhone, etc.)
 - On a different browser (IE, Chrome, Firefox, Safari)
 - User changes their user name
- Every 180 days
 - Validation will be required
 - Password change will be required
- Validation issues not related to above scenarios
 - Support is investigating



Validation emails from <u>DoNotReply@nerc.net</u> – Please validate your NERC ERO Account Information

- You should receive the validation email within a couple of minutes
- If you did not receive the validation email, check 'spam' or 'junk' folders
- If validation email is not in 'spam' or 'junk' folders check with your IT department to verify if the email is blocked
- If your IT department did not block the validation email contact <u>ballotadmin@nerc.net</u>



Standards Information



- Program News
 - Weekly Standards Bulletin
- <u>Standards Processes Manual</u>
- <u>Resources</u>
- SBS questions/feedback <u>ballotadmin@nerc.net</u>





Questions and Answers



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