

**NERC**

NORTH AMERICAN ELECTRIC  
RELIABILITY CORPORATION

# ALIGN

## Regional Entity Newsletter

March 2022

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**LET'S GET ALIGNED: KEY TAKEAWAYS**

**Release 3 Update**

Performance optimization efforts for Release 3, as outlined in the January edition of the *Align Newsletter*, are near completion. The project team began deployment of final application updates to production in mid-March. The modifications will also remove the current batch-load restrictions on periodic data submittals (PDS) and self-certifications (SC).

The following activities were identified as part of the mid-March modifications for Release 3:

- Redesigned PDS and SC in the assignment area
- Refactored database queries for dashboards and reporting capability
- Vendor review of Release 3 audit design to ensure optimal performance (Vendor will do a deep review of future technical designs)
- Additional performance testing performed by a third party

With the final deployment of modifications, the Regional Entities (REs) are shifting their focus now to Release 3 adoption plans. The chart below outlines the regional approaches and timing. Please contact your Regional Change Agents with any questions.

 *In Progress*

Region	Adoption Approach
Texas RE	Will send notifications in April 2022 for Q3 audits and use Align for all remaining audits
WECC	Will start in April 2022 with first notification for audit in August 2022; timing of full adoption based on initial Align audits
SERC 	Began in February 2022 with the first notification; two initial entities will complete audits end-to-end, then review processes for lessons learned and conduct two additional audits
NPCC	Will start in April 2022 with first notification for off-site audit; will reassess after completion on the timing of full-time use
MRO	Will start in April 2022 with the first notification for Q3 coordinated oversight audit; will complete one audit end-to-end, then review processes for lessons learned
RF 	Began in March 2022 with first notification for audit in June 2022; will reassess after completion on the timing of full-time use

## Release 4

Now that Release 3 modifications are near completion, the Align project team has turned its focus back to Release 4. The Align Steering Committee approved the scope of Release 4, which will include additional required features for audit and scheduling, inherent risk assessments (IRAs), and compliance oversight planning (COPs).

Release 4 will have two production deployments: R4.0 will deploy in June with enhanced audit and scheduling functions, and R4.5 will deploy in October with IRAs and COPs. This approach will enable valuable features sooner and allow for focused training and adoption plans.

## *Data Migrations from Legacy Systems*

The completion of Release 4 will also mean the retirement of legacy systems (webCDMS and Guidance). The data team (a sub-group of the Align project team) is developing a migration plan for each type of data by Region that has identified the required data from these systems. The goal is to complete all migrations by December 2022. This data will include a subset of past scheduled engagements as well as closed and open violations. Not all historical data will be migrated. The data migration is the final key element to completing the scope outlined in the Align business case.

## Canadian Jurisdictions' Use of Align

The Align project team continues to work with those REs that support Canadian regulators—MRO, NPCC, and WECC—to create project plans and activities in support of using Align. These activities include determining detailed requirements by province, importing provincial standards data into Align, and defining the appropriate user roles.

The requirements definition work is completed. The project team will analyze the requirements to determine a schedule for completion. This schedule will be shared with the Regional Change Agents as soon as it's available and in the May newsletter.

## Accessing Align

An important part of the project's success is ensuring appropriate access to the system. An active ERO Portal Account is required to access Align and the ERO SEL. **Please follow the instructions below to verify an existing account or set up a new account and note that it takes 48 hours for a new account to be activated.** For password resets, select the "Forgot Password/Username" to reset a password. For questions or problems concerning ERO Portal accounts, please submit a support ticket [here](#).

All registered entities' primary compliance contacts (PCCs) should also have an ERO Portal Account and be set up as Align Registered Entity Submitters and the Entity Administrators responsible for approving access requests. Users approved by the PCCs are automatically given an ERO SEL submitter role. Additional access to the ERO SEL outside of Align access must be handled with a support ticket.

Refer to the [Registered Entity User Access Guide](#) for detailed instructions.

**To Set Up an ERO Portal Account:**

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

**To Verify an ERO Portal Account:**

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

**Quick Links for Reference**

Here is a list of links to commonly requested project materials for Align and the ERO SEL. Please reach out to your Change Agents for additional materials.

Quick Links
<a href="#">FAQs</a>
<b>NEW</b> <a href="#">ERO Enterprise BES Artifacts Submittal Exception Process</a> (February 2022)
<a href="#">Align Governance Model</a> (Updated April 2021)
<a href="#">Registered Entity SEL Requirements</a> (Updated February 2021)
<a href="#">NERC Training Site</a>
<a href="#">CEA SEL User Guide</a>
<a href="#">Release 1 CEA User Guide</a>
<a href="#">Release 2 CEA User Guide</a>
<a href="#">Release 3 CEA User Guide</a>
<a href="#">Registered Entity User Access Guide</a>
<a href="#">Data Handling Guide to Align and ERO SEL</a>
<a href="#">Align Business Case</a>

### Want to Learn More? Key Contacts and Resources

Please submit questions to [AskAlign@NERC.net](mailto:AskAlign@NERC.net) or reach out to your Regional Change Agent. The change agents meet monthly and have the latest project updates. They are another resource for asking questions or sharing comments and feedback on the project.

Align Change Agents	
Organization	Change Agents
MRO	<a href="#">Desiree Sawyer</a> , <a href="#">Marissa Falco</a>
NERC	<a href="#">Jamie Calderon</a> , <a href="#">Farzaneh Tafreshi</a> , <a href="#">Sara Minges</a>
NPCC	<a href="#">Jason Wang</a> , <a href="#">Kimberly Griffith</a>
ReliabilityFirst	<a href="#">Anthony Jablonski</a>
SERC	<a href="#">Andrew Williamson</a> , <a href="#">Janice Carney</a> , <a href="#">Melinda Montgomery</a> , <a href="#">Rick Dodd</a> , <a href="#">Todd Curl</a>
Texas RE	<a href="#">Rochelle Brown</a>
WECC	<a href="#">Angie Shapiro</a> , <a href="#">Ben Aldous</a> , <a href="#">Mailee Cook</a>

Release 3 Training Contacts	
Region	Training Leads
MRO	<a href="#">Desiree Sawyer</a> ; <a href="#">Jeremy Mattke</a>
NPCC	<a href="#">Jason Wang</a> ; <a href="#">Kimberly Griffith</a>
ReliabilityFirst	<a href="#">Bob Folt</a> ; <a href="#">George Spila</a> ; <a href="#">Anthony Jablonski</a> ; <a href="#">Ron Ross</a>
SERC	<a href="#">Serge Beauzile</a> ; <a href="#">Clay Shropshire</a> ; <a href="#">Robert Vaughn</a> ; <a href="#">Rick Dodd</a> ;
Texas RE	<a href="#">Ben Gregson</a> ; <a href="#">Dennis Glass</a> ; <a href="#">Devin Kitchens</a> ; <a href="#">Eric Newnam</a> ; <a href="#">Rochelle Brown</a>
WECC	<a href="#">Angie Shapiro</a> ; <a href="#">Jessica King</a> ; <a href="#">Holly Peterson</a> ; <a href="#">Phil O'Donnell</a> ; <a href="#">Brittany Crosby</a>

## ABOUT THE ALIGN NEWSLETTER

This newsletter compiles a list of important Align project updates with actionable deadlines, as well as upcoming events, recently posted resources, and other relevant news and information. Please email [AskAlign@nerc.net](mailto:AskAlign@nerc.net) with feedback on this newsletter. Current and future newsletters and additional project resources, including the regularly updated [Align FAQs](#), can be found on the [Align Project Site](#).