Oncor Distribution Generation Installer Portal Training Guide

Index

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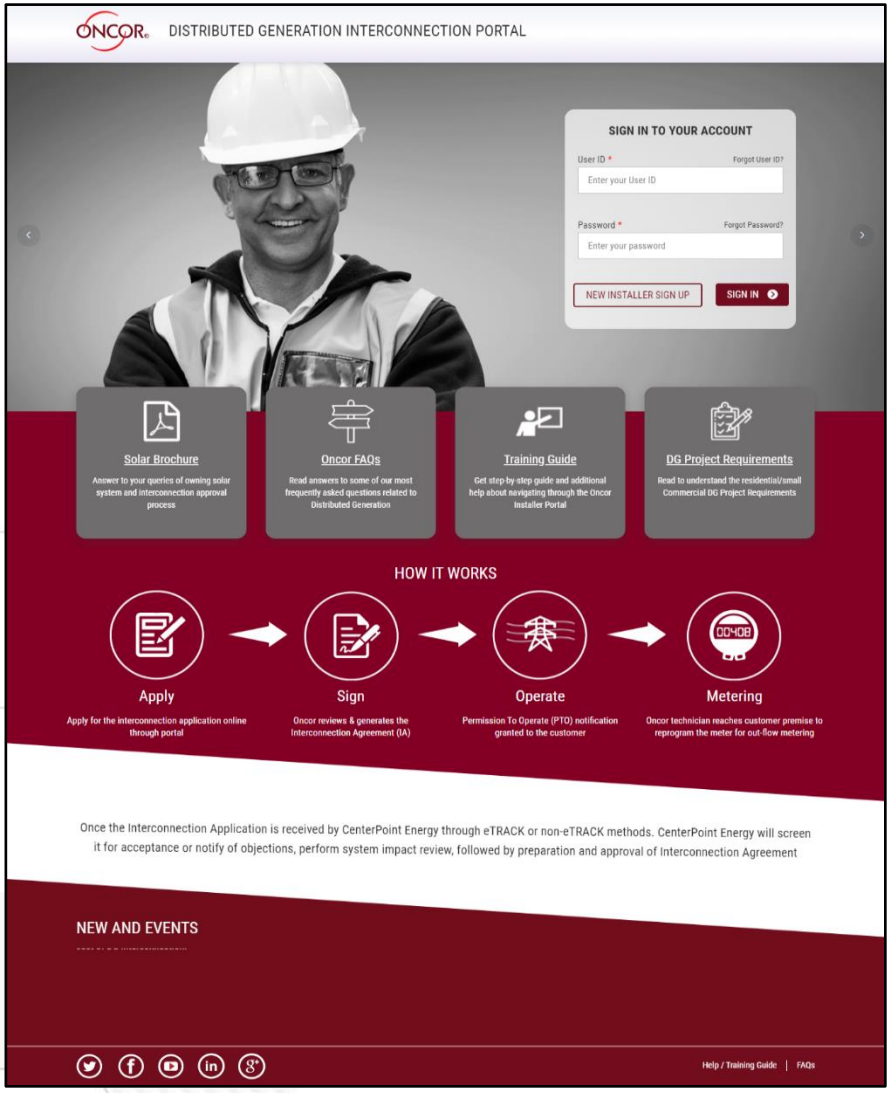
1. Introduction to Oncor DG Portal



About Oncor DG Portal

Oncor DG Portal facilitates the installers and customers to submit their DG applications.

Key Features

- Self-Registration
- DG Application instructions
- Self-Explanatory
- Regenerating eSignature, swap between digital and wet sign
- Added DG Approval
- Oncor latest news and upcoming events
- Autofill Functionality
- Contact us – Reach our social media platform

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2. ALL WEB PAGES – NAVIGATION, BUTTONS, FEATURES & FUNCTIONALITIES

2.1 Oncor DG Portal Landing Page

1. Enter User Name and Password
2. Click Sign-in
3. Click “New Installer Sign up” for New Registrations

- **Solar Brochure:**. PUC requirements to submit the Interconnection Application package.
- **Oncor FAQs:** It contains a document of Frequently Asked Questions related to Interconnection agreements and Oncor ’s services to the Installers and the Users.
- **Training Guides:** It contains a document with brief explanations of all the features, procedures, possible functionalities and processes in the Installer Portal.
- **DG Portal Requirements:** Explains the detailed documentation of Oncor

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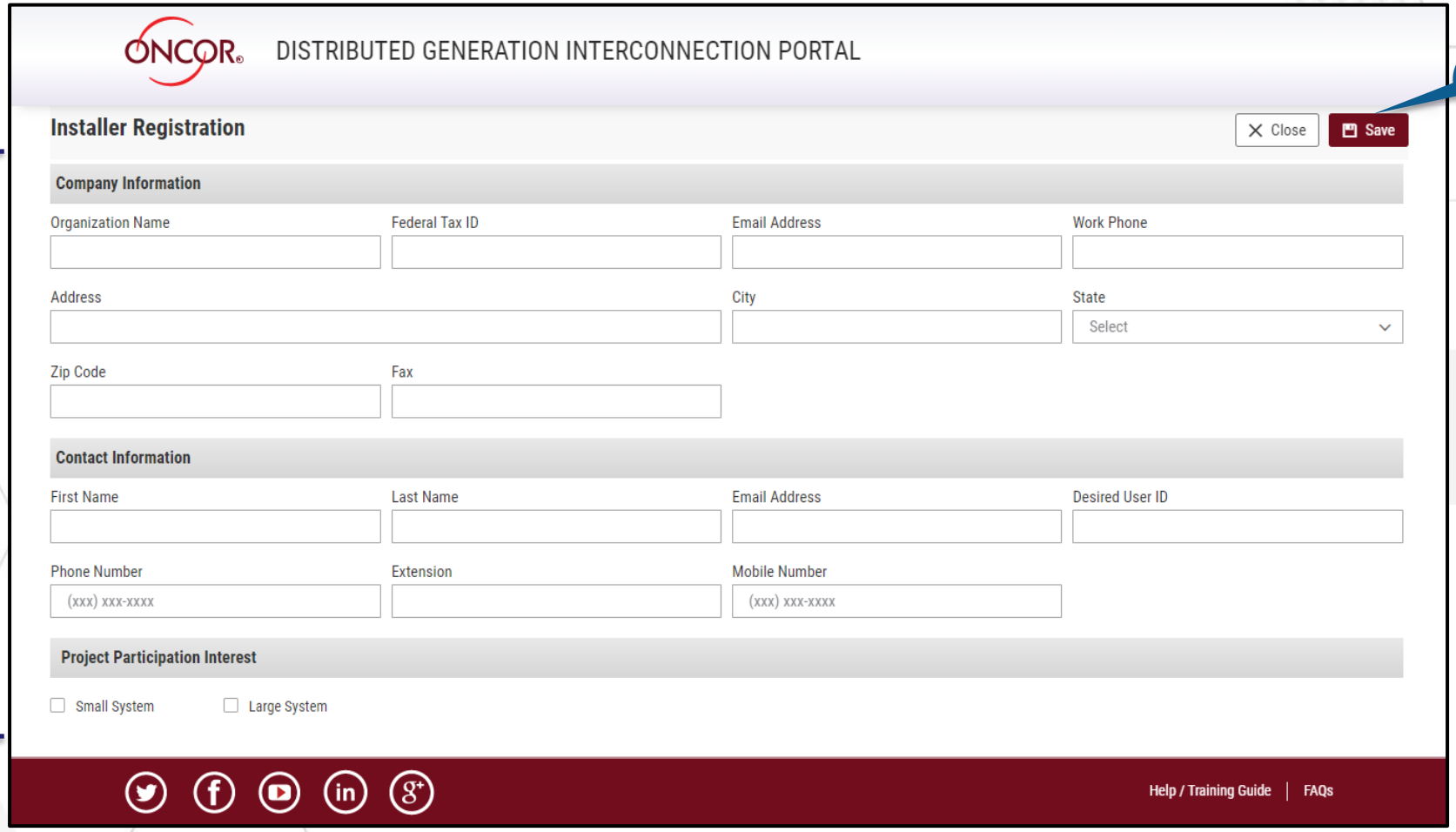
2.2 Registration Page



1. Fill in all the fields required for Installer Registration
2. Click on Save and wait for the DG approval

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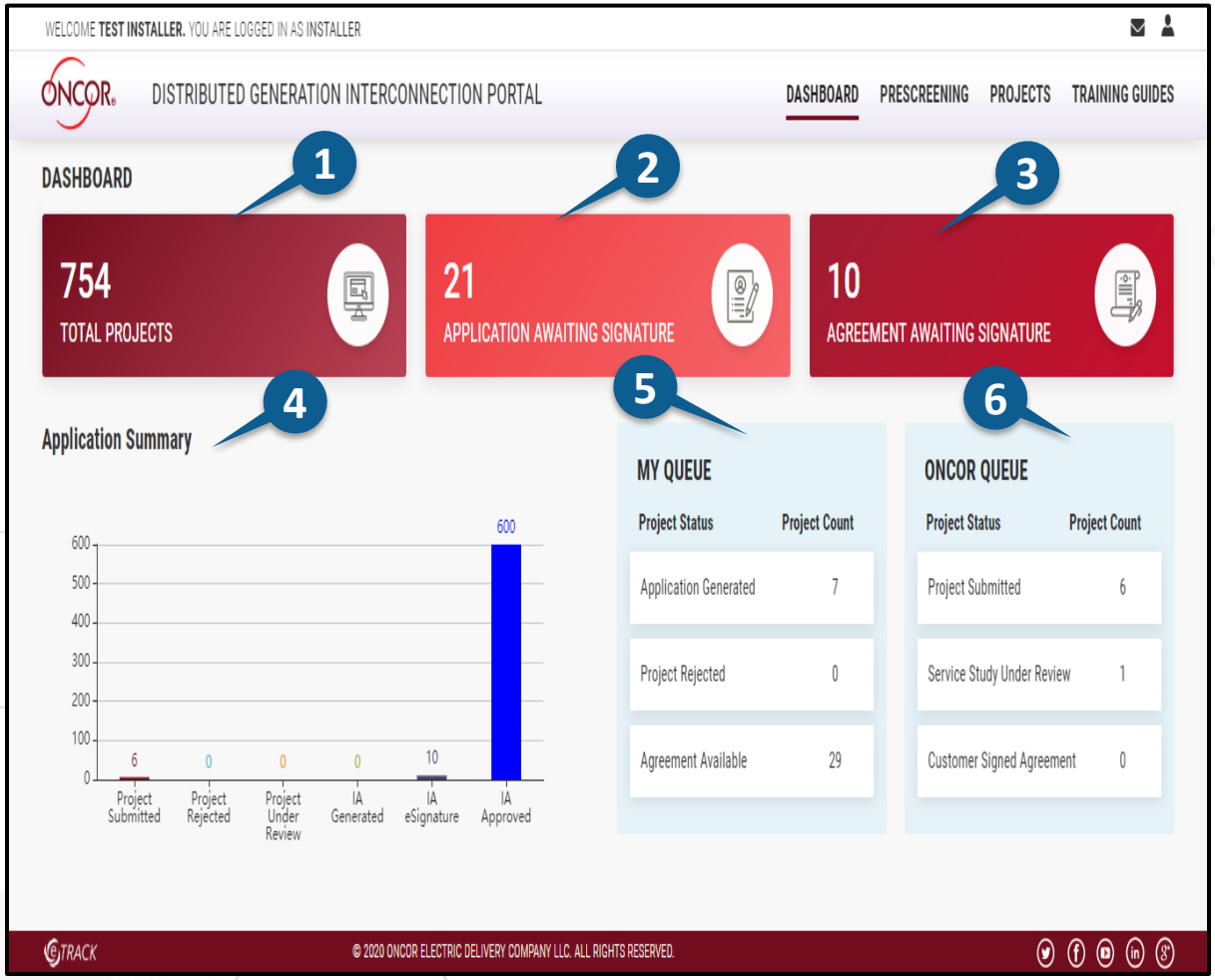
2.3 Dashboard



1) Displays the count of Total Projects created by the installer organization,
2) Displays the count of Tariff Applications waiting for Signature
3) Displays the count of Interconnection Agreements waiting for Signature
4) Graph displays the count of applications based on its current existing workflow state.
5) Installers queue
6) Oncor's queue

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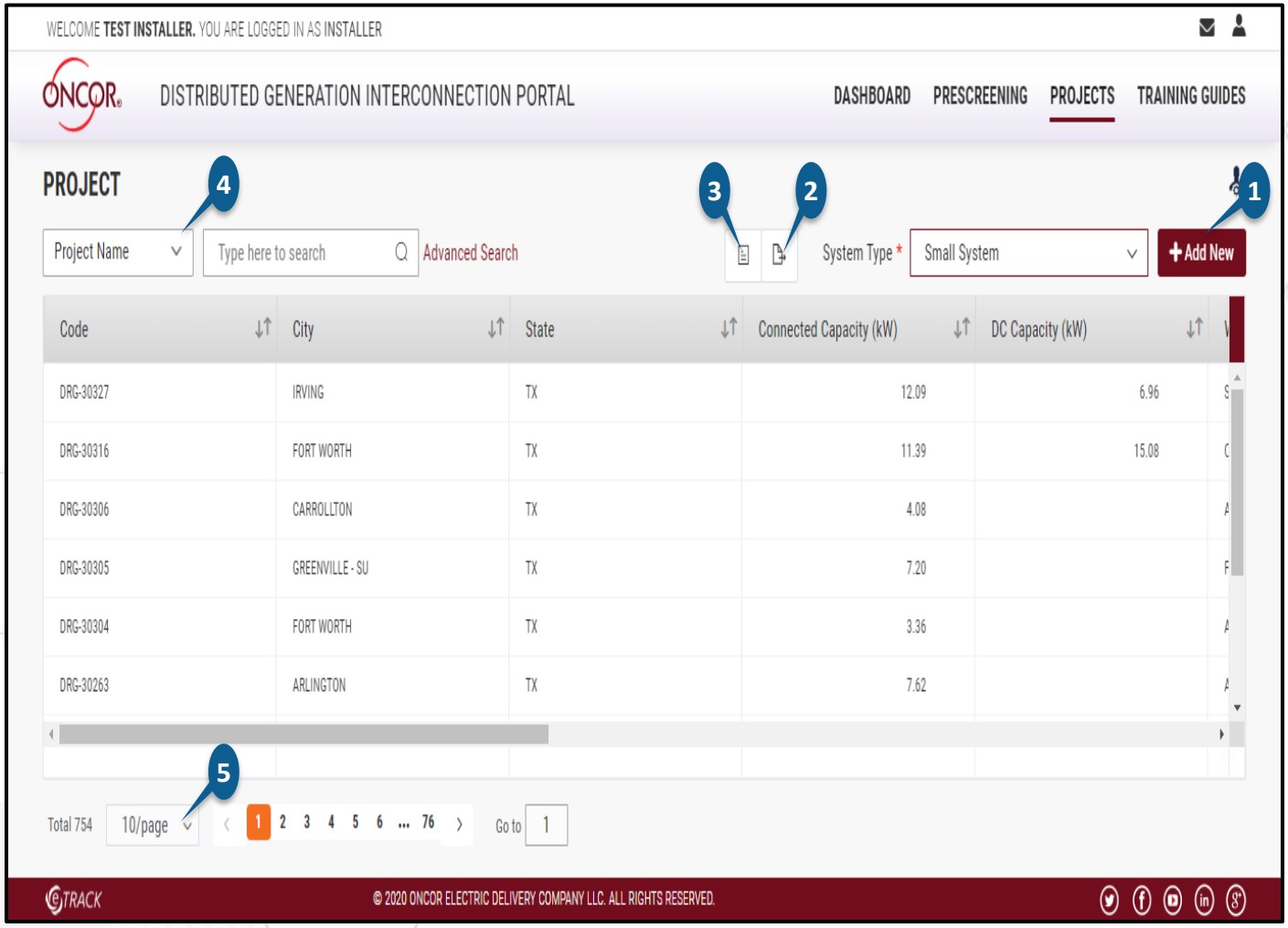
2.4 Project List Page



1. **Add Projects:** To create New projects
2. **Export to CSV:** To download the project list as csv file format
3. **Show/Hide Columns:** Helps user to hide/show the columns.
4. **Project Filter drop-down:** It allows the user to refine the search criteria based on program type, Project code, project name etc.
5. **Items Per Page:** It allows the User to select number of Projects to be displayed in single page

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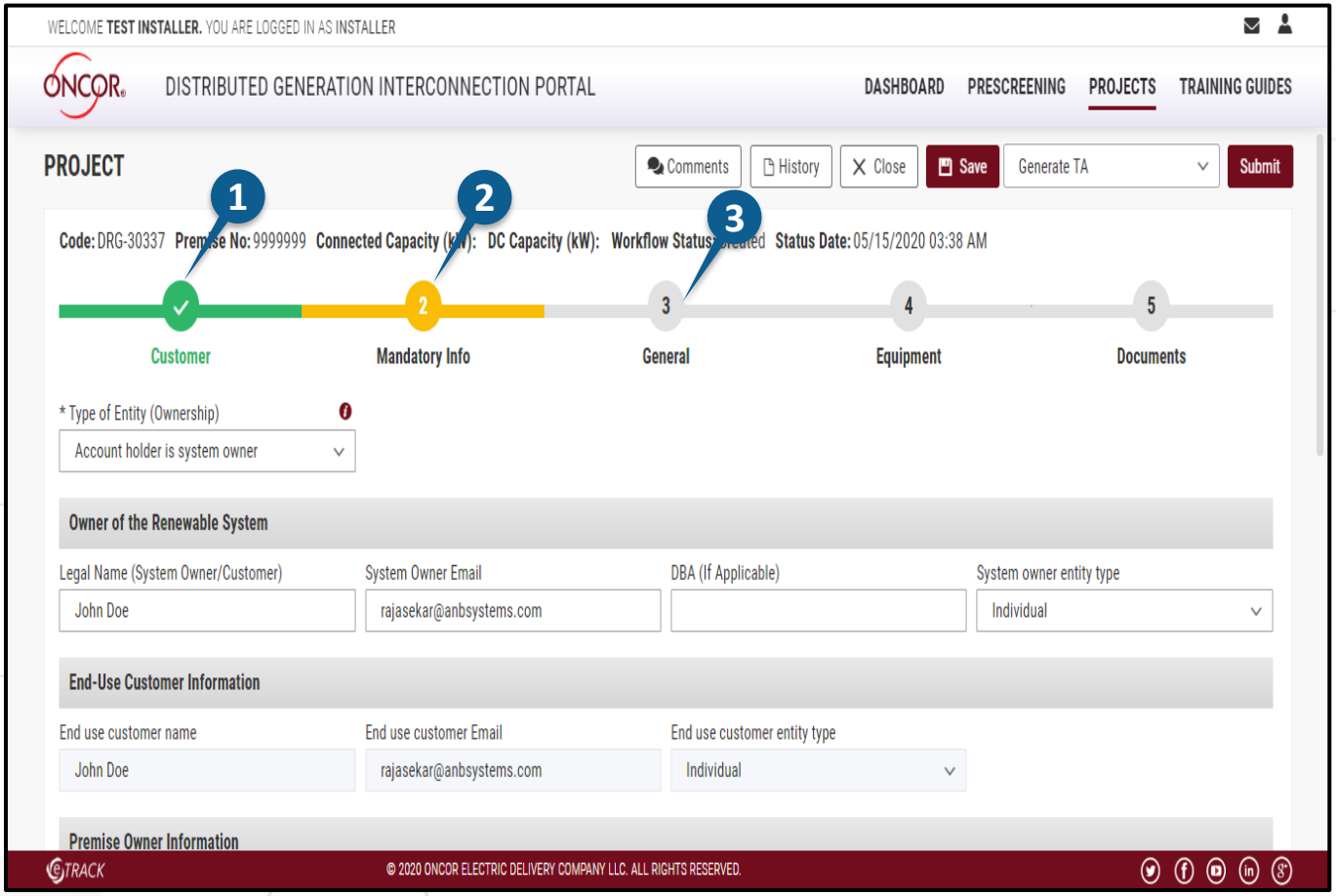
2.5 Project Tabs Navigation



1. **Green color** with "Check" mark represents that the information in that particular tab has been filled successfully by the User
2. **Yellow color** represents the Tab which is in progress by the User
3. **Grey color** represents the tab has not been completed filling by the User

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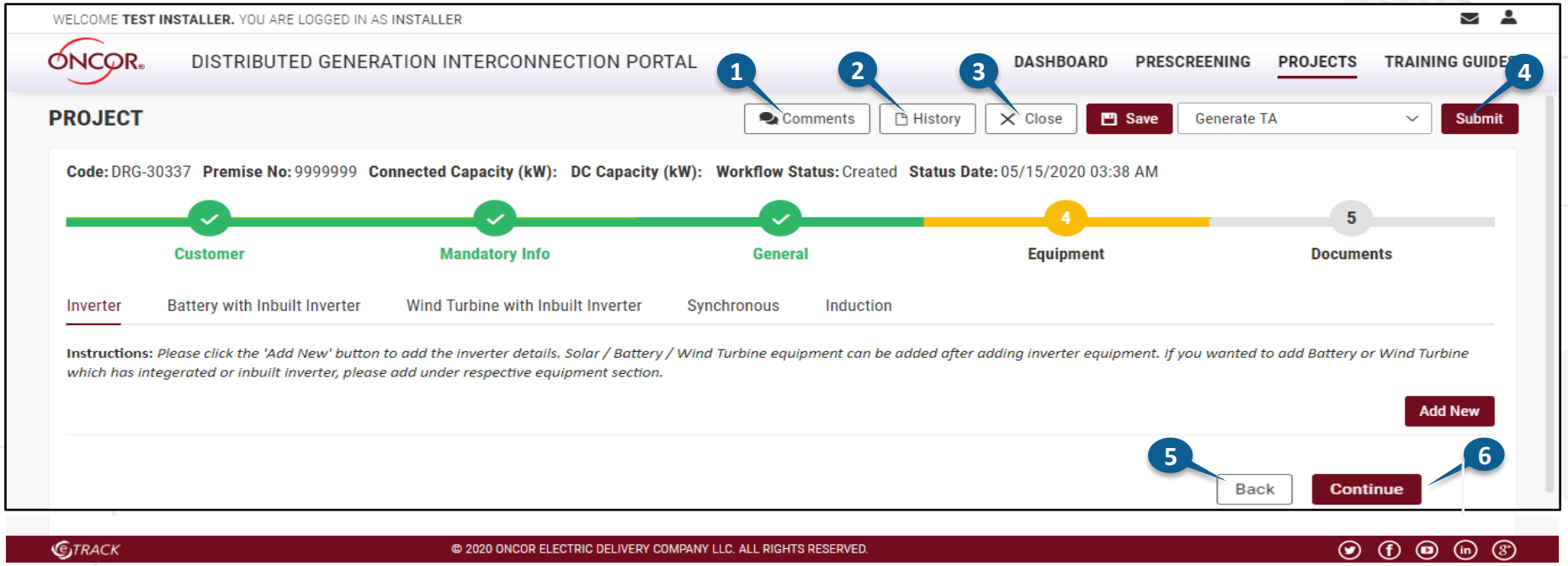
2.6 Tool Bar



1. **Comment box** contain all the comments related to the Project. Clicking on it allows the user to add/view comments and filter comments based on User ID, Timeline and Comments Type
2. **History** displays the transitional history view of the timeline of comments and the project
3. **Close** will Exit the application and lands in the project list page
4. **Submit** allows the user to submit the application, based on the **Workflow status** selected from the drop-down
5. **Back button** will take the User to the Previous tab
6. **Continue button** allows the user to save and proceed the application

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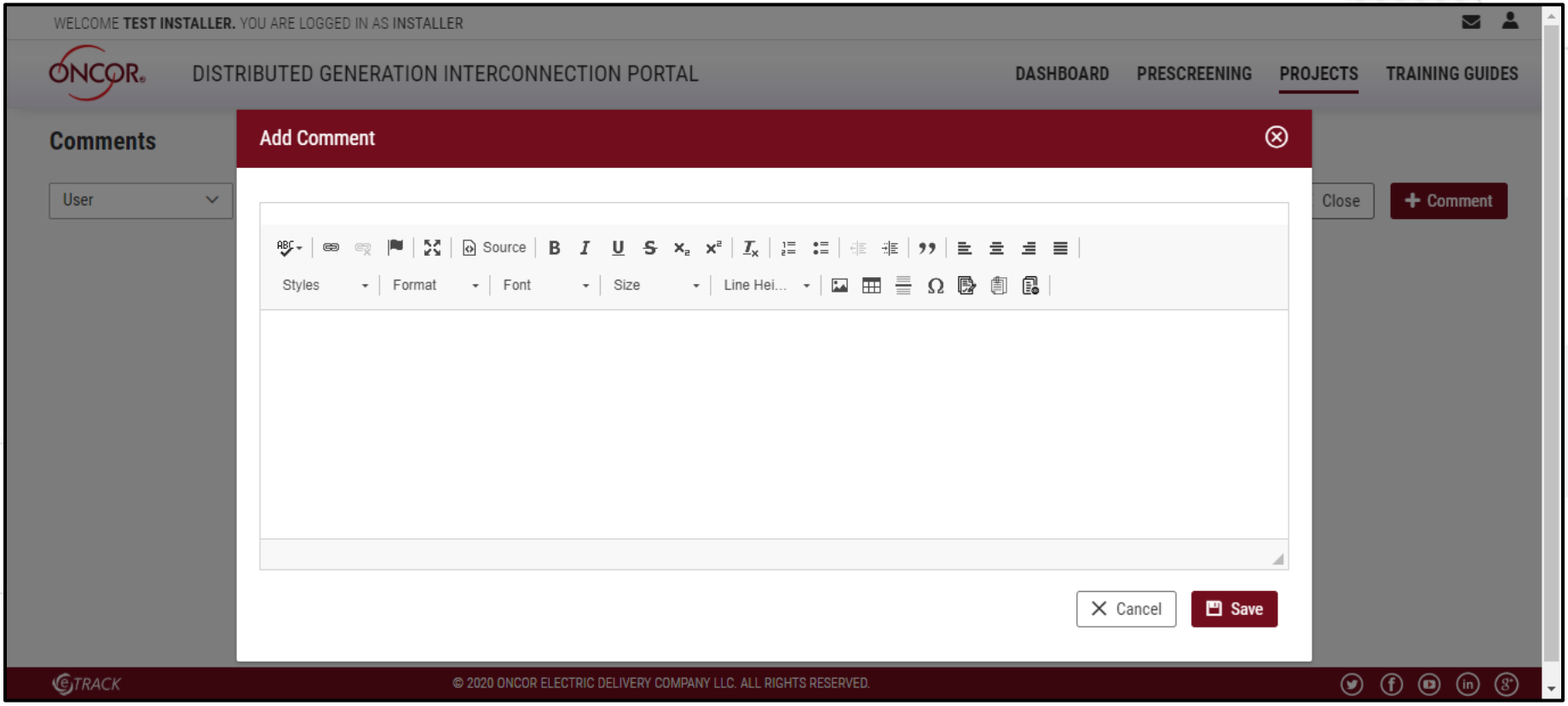
2.7 Add Comments



1. Add comments in the space given
2. Click **Save**

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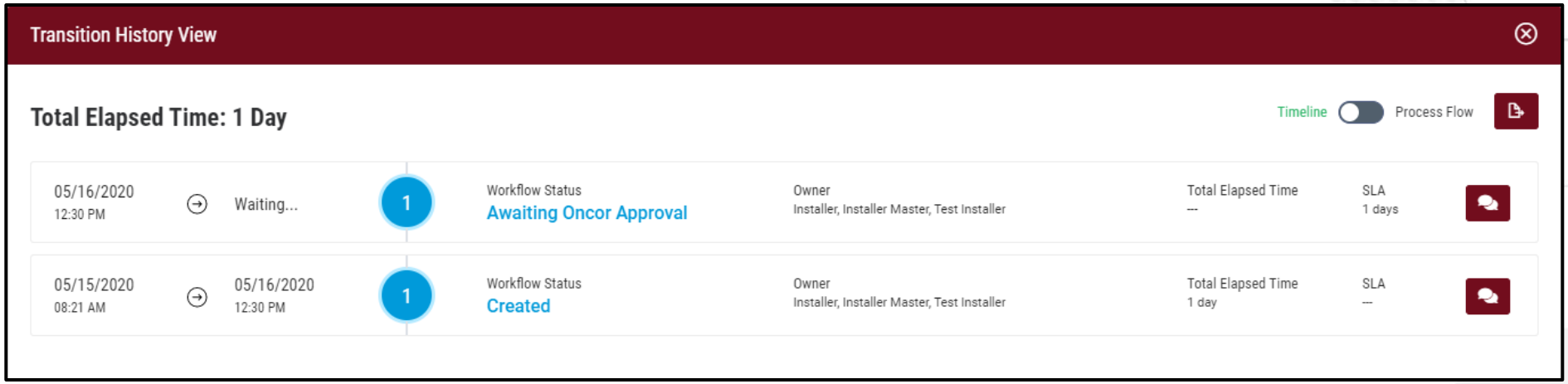
2.8 Comments – Timeline View



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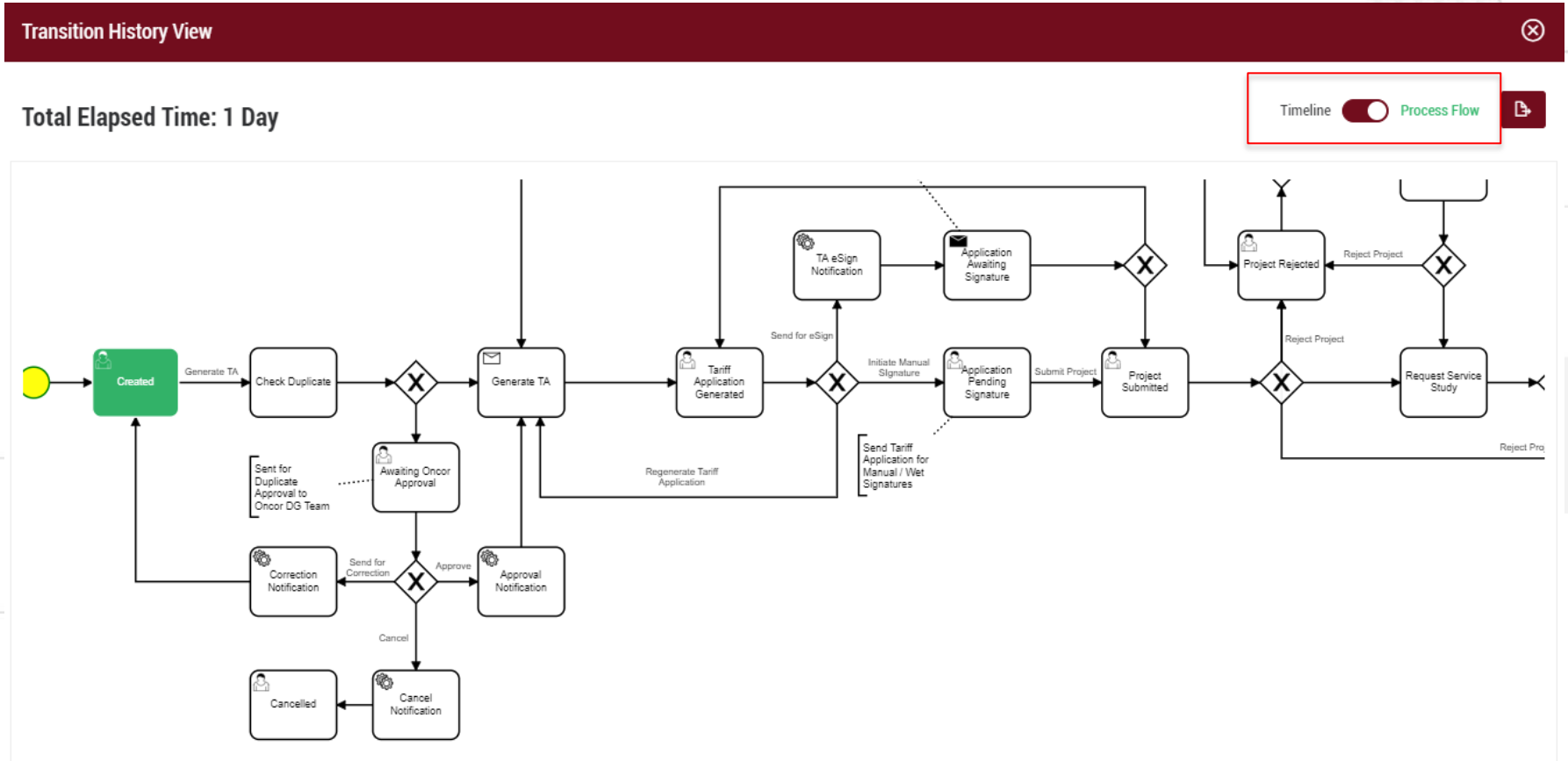
2.8 Comments – Process View



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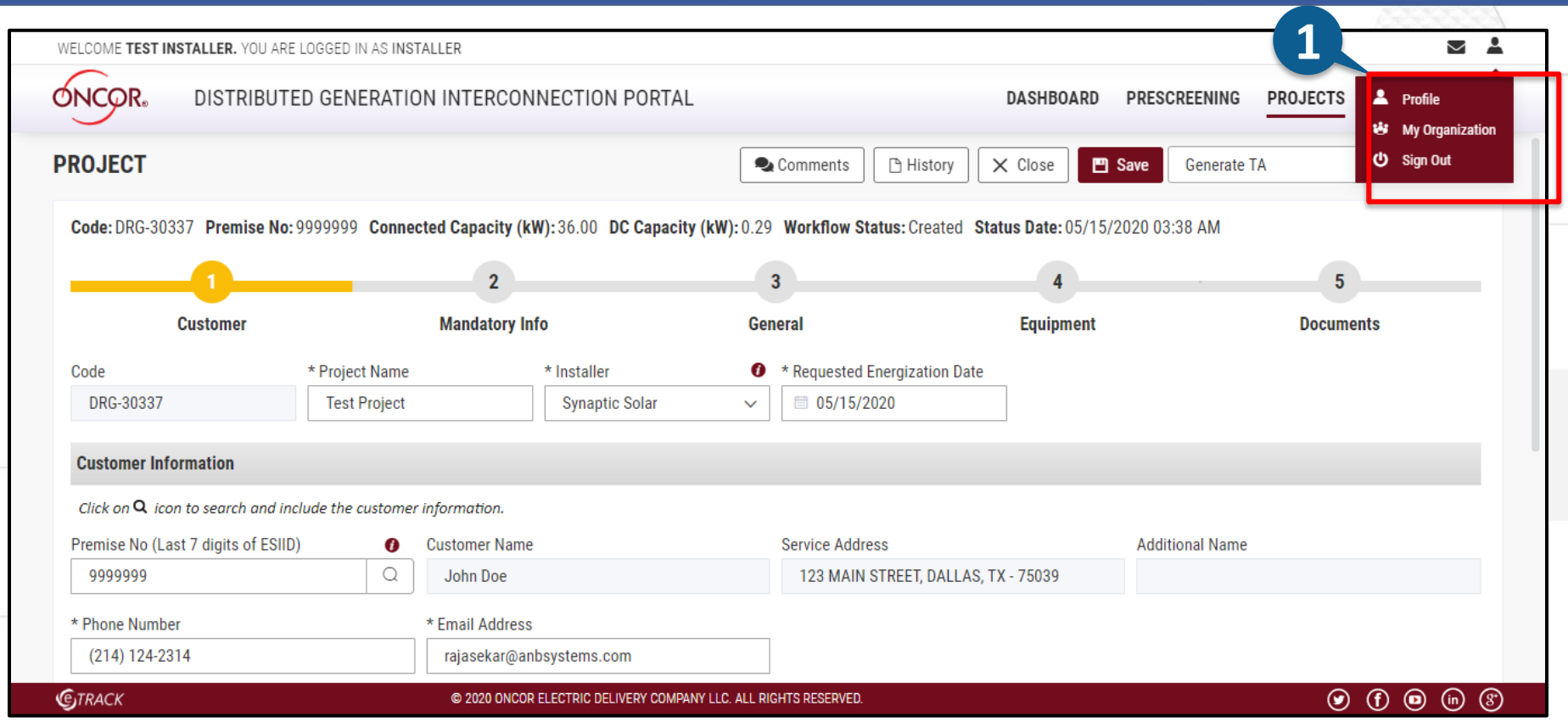
2.9 Account Menu Bar



1. Click to User Menu Icon (To access) below:
   - **My profile**
   - **Announcements**
   - **Sign Out**

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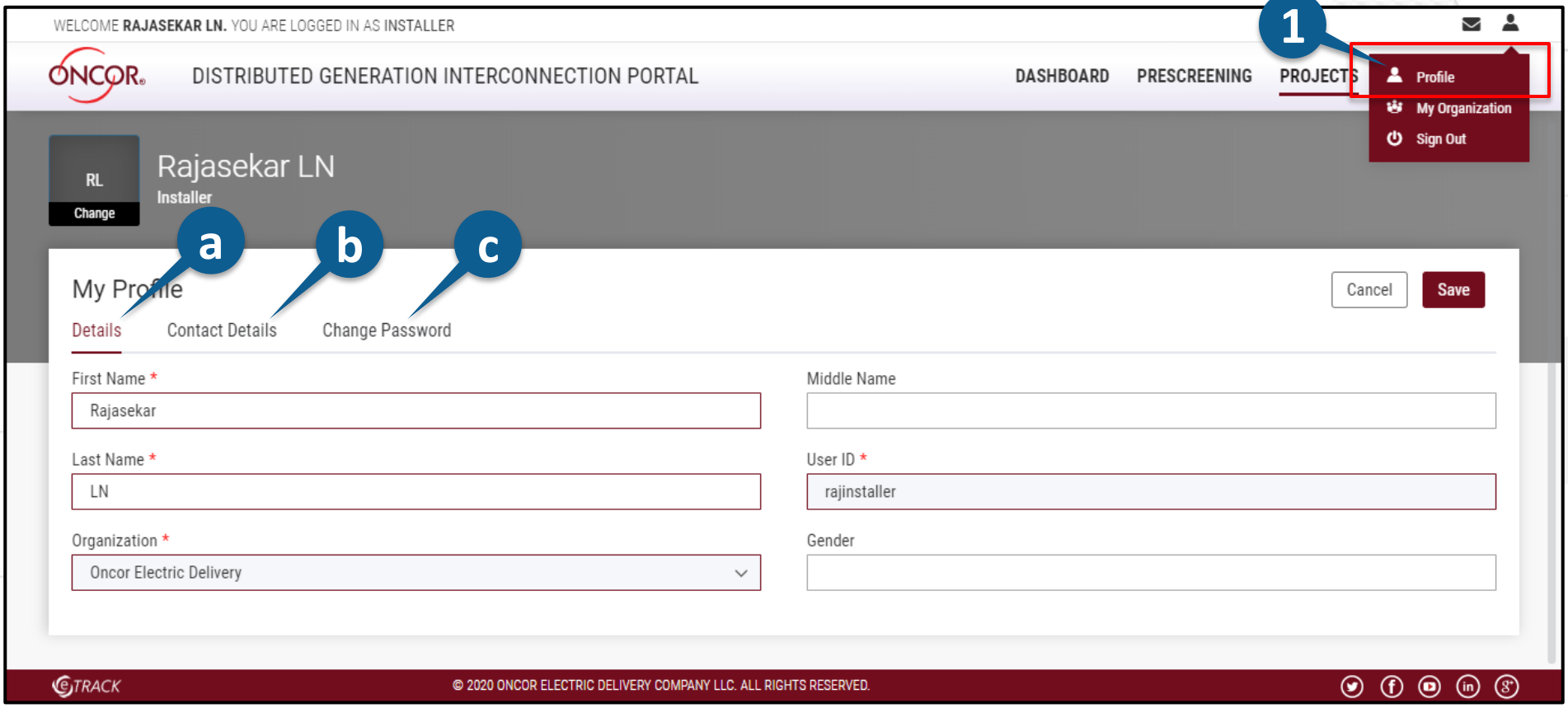
2.10 My Profile



1. Click on My Profile
    a. View Personal Details
    b. View Contact Details
    c. Change the Password

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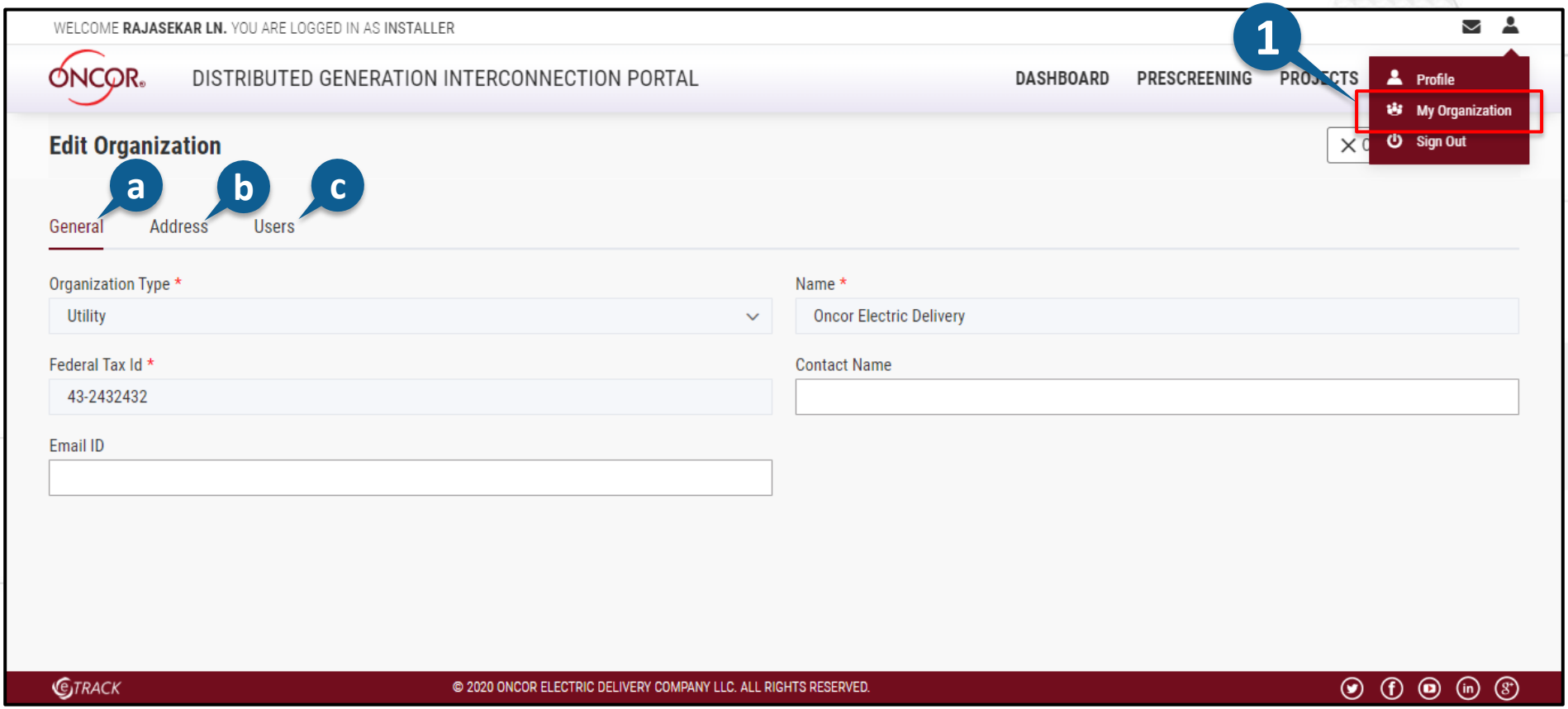
2.11 My Organization



a. View Organization Information
b. Add/Edit/Delete the Billing Address
c. Add new users, Edit/Delete existing users, View current users and Reset their Password

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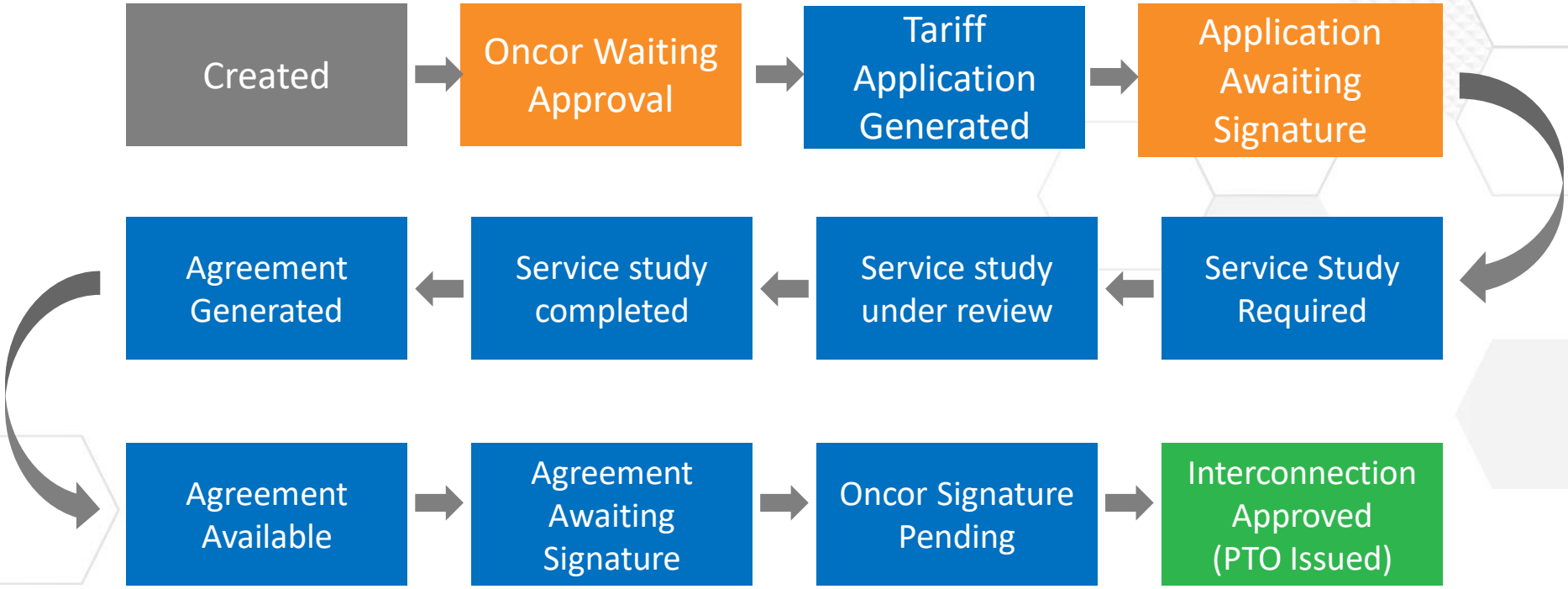
3. PROJECT WORKFLOW

3.1 Small Systems Workflow



- Oncor Waiting Approval occurs only if it is a duplicate project
- Application Awaiting signature- eSignature
- Application Pending signature- Manual signature
- Agreement Awaiting Signature – “Account holder is system owner” option
- TPOS Agreement Awaiting Signature – Other options of IA Entity Type

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4. NEW INSTALLER SIGN-UP AND APPROVAL PROCEDURE

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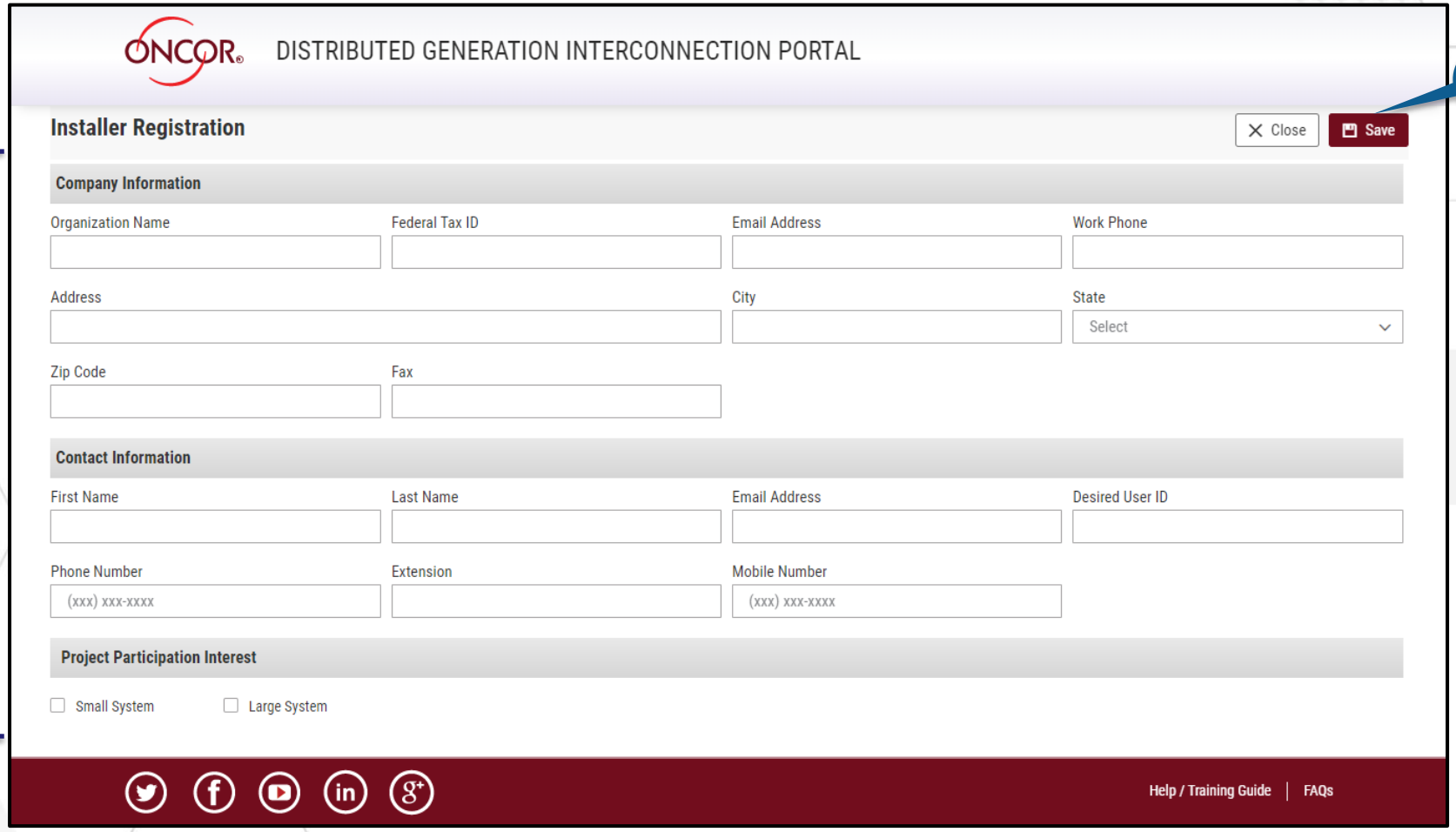
4.1 New Installer Sign Up Form



1. Fill in all the fields required for Installer Registration
2. Click on **Save** and wait for approval

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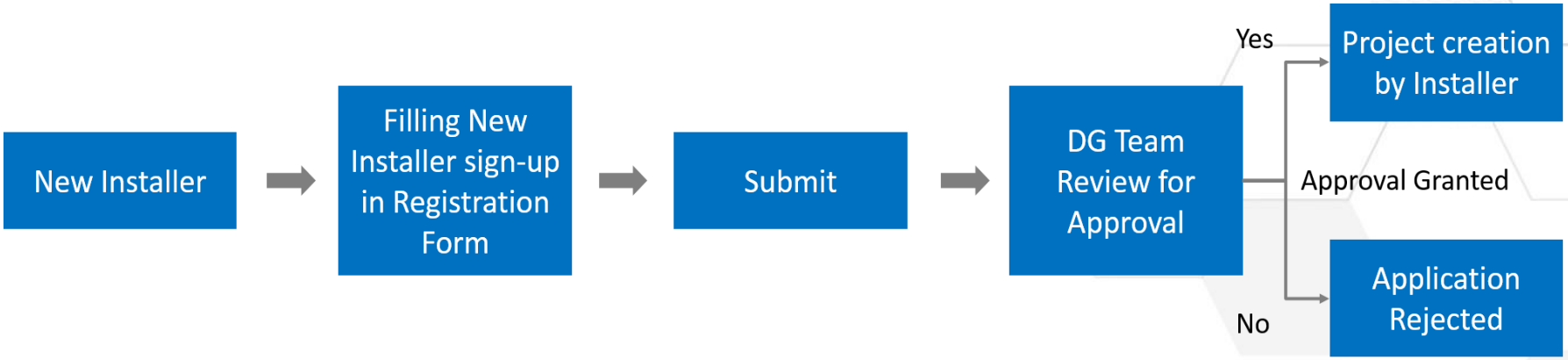
4.2 Approval Procedures



Step 1: The New Installer will complete the registration in "New installer Sign-Up Registration Form"

Step 2: Click Submit after filling the form

Step 3: After submitting the Installer's sign-up form, it will be sent to the DG Group for approval

Step 4: Until the Installer is approved by the DG team, projects cannot be created by the Installer. However, the Installer can view the Dashboard and other things.

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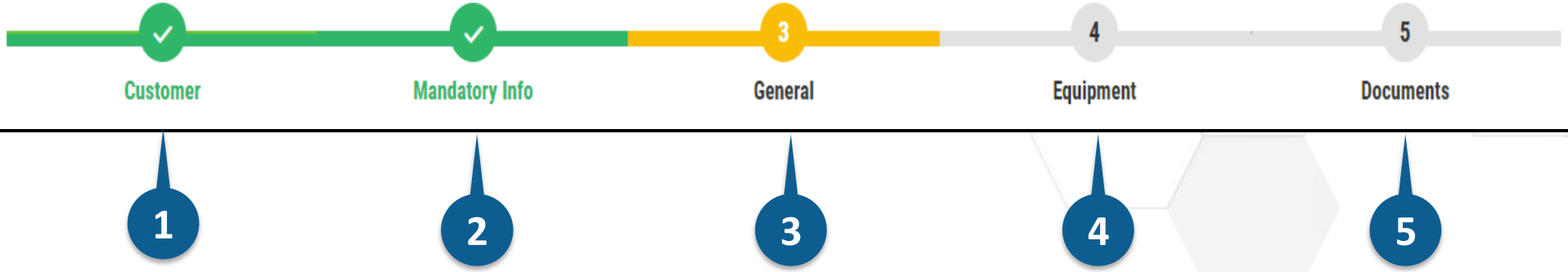
5. INTRODUCTION TO TABS IN THE PORTAL

5 Introduction to Tabs in Portal



Five Tabs for creating project:

1. Customer
2. Mandatory Info
3. General
4. Equipment
5. Documents

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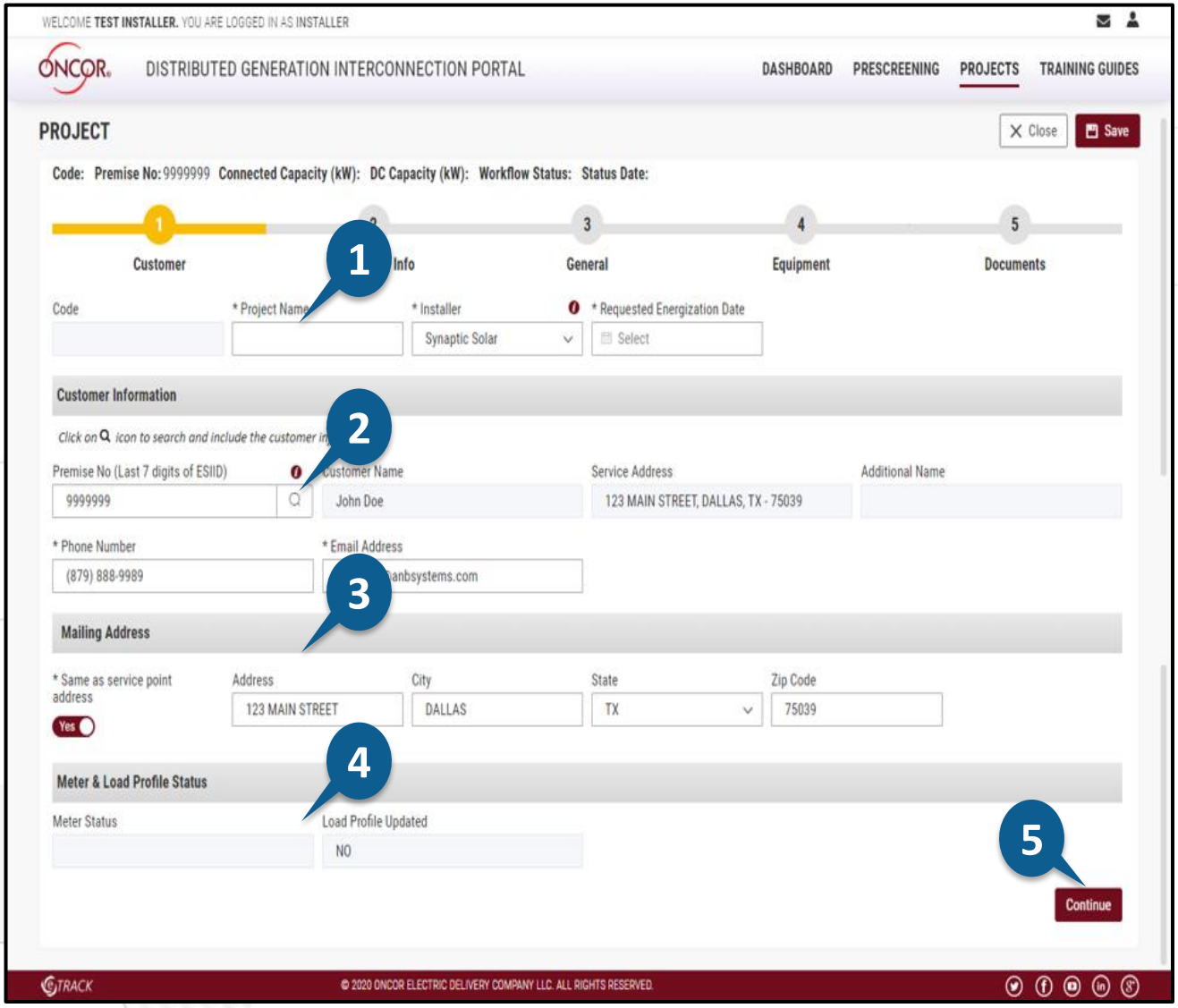
6. PROJECT CREATION

6.1 Customer Tab



1. Enter the project name, choose the installer and select the Requested Energization date
2. Search and add the premise by clicking the magnifier icon, enter phone number and email address
3. If the mailing address is same as the Service point address select Yes, if no please provide.
4. Meter & Load Profile Status
5. Click **Continue**

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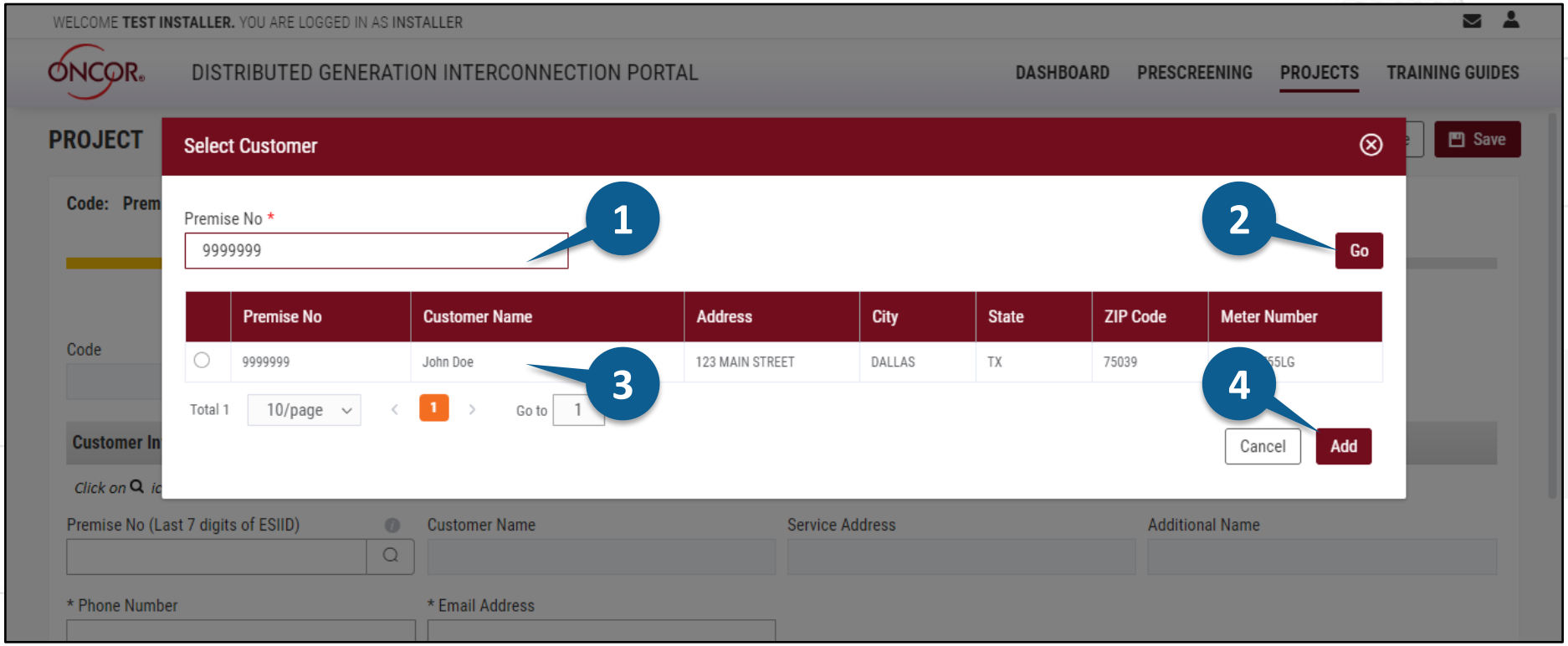
6.1 Customer Tab – Add Premise



1. Enter correct the 7-digit premise number
2. Click on **Go**
3. Select the correct premise record from the listed customer record
4. Click on **Add**

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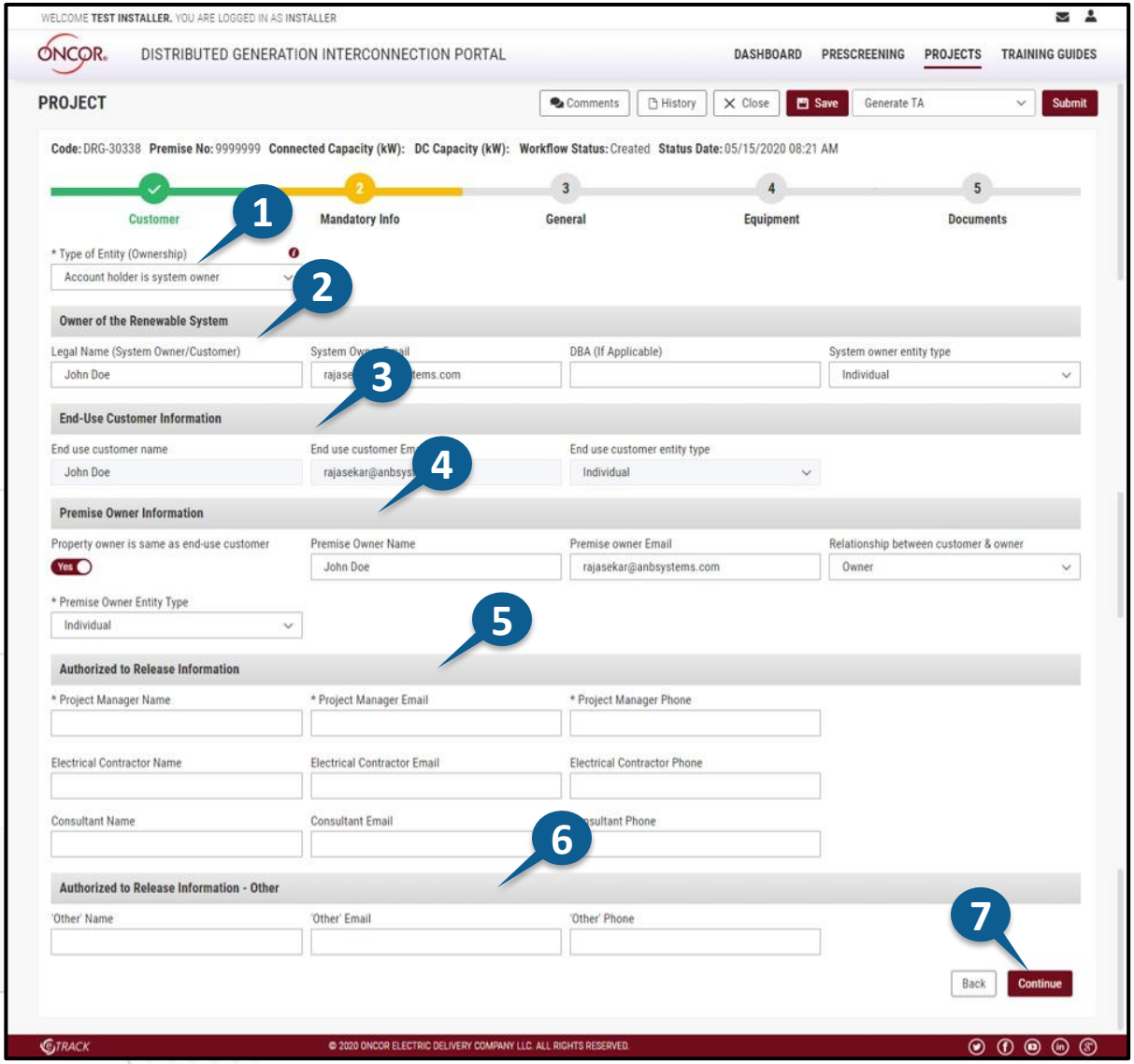
6.2 Mandatory Info Tab



1. Select the Entity Type
2. Fill the fields under Owner of the Renewable System
3. End-Use Customer Information
4. Under Premise Owner Information, If we select “Yes” for “Property owner is same as end-use customer” the fields under will be auto populated
5. Fill the fields under Authorized to Release Information
6. Fill the fields under Authorized to Release Information - Other
7. Click **Continue**

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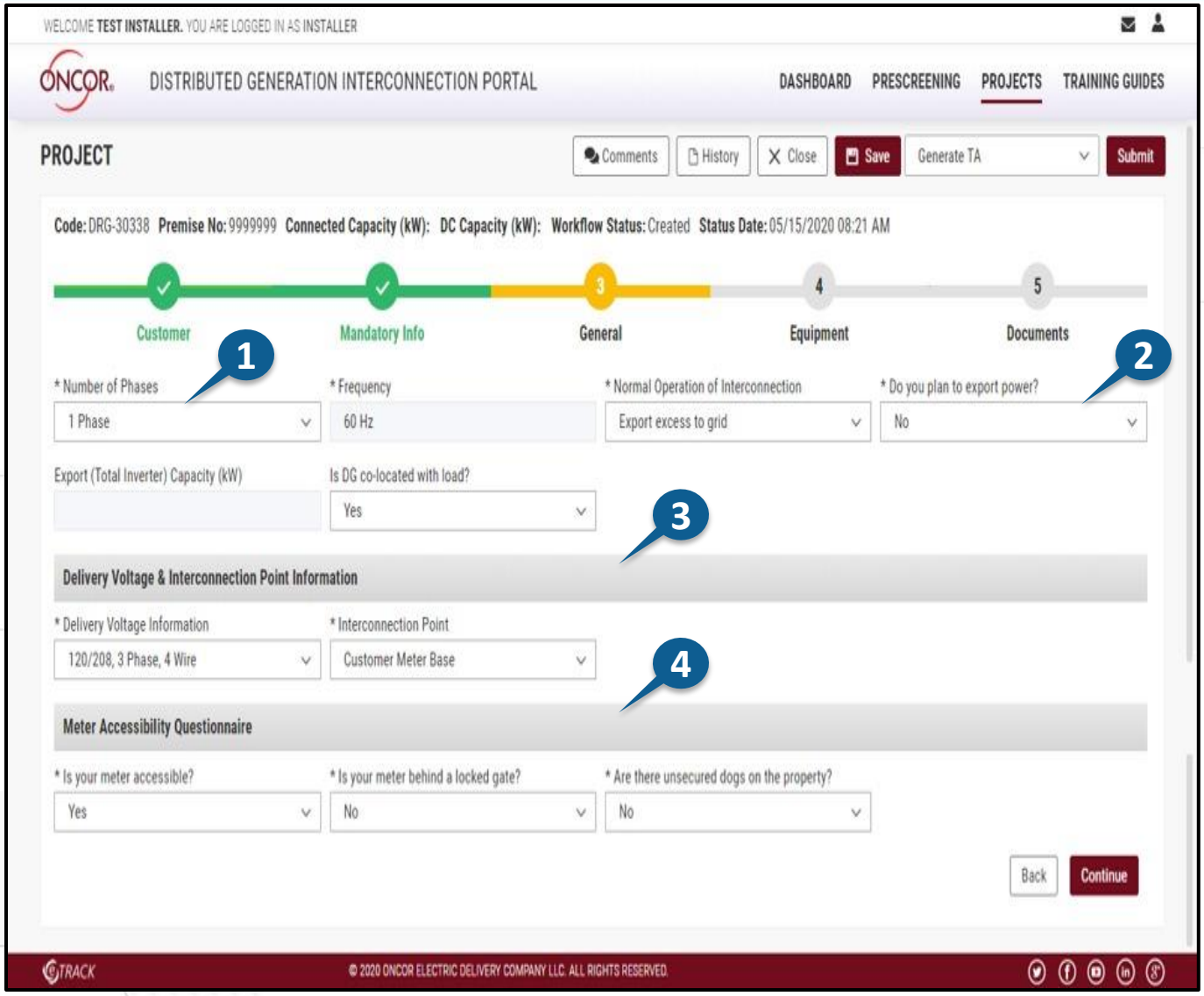
6.3 General Tab



1. Fill in the fields No of Phases, Normal Operation of Interconnection.
2. If ***Oncor to export power*** is selected as "Yes", please provide the ***Total Inverter capacity.*** If "No", leave it blank.
3. Fill in the fields under ***Delivery Voltage & Interconnection Point Information***
4. Fill in the ***Meter Accessibility Questionnaire***
5. Click **Continue**

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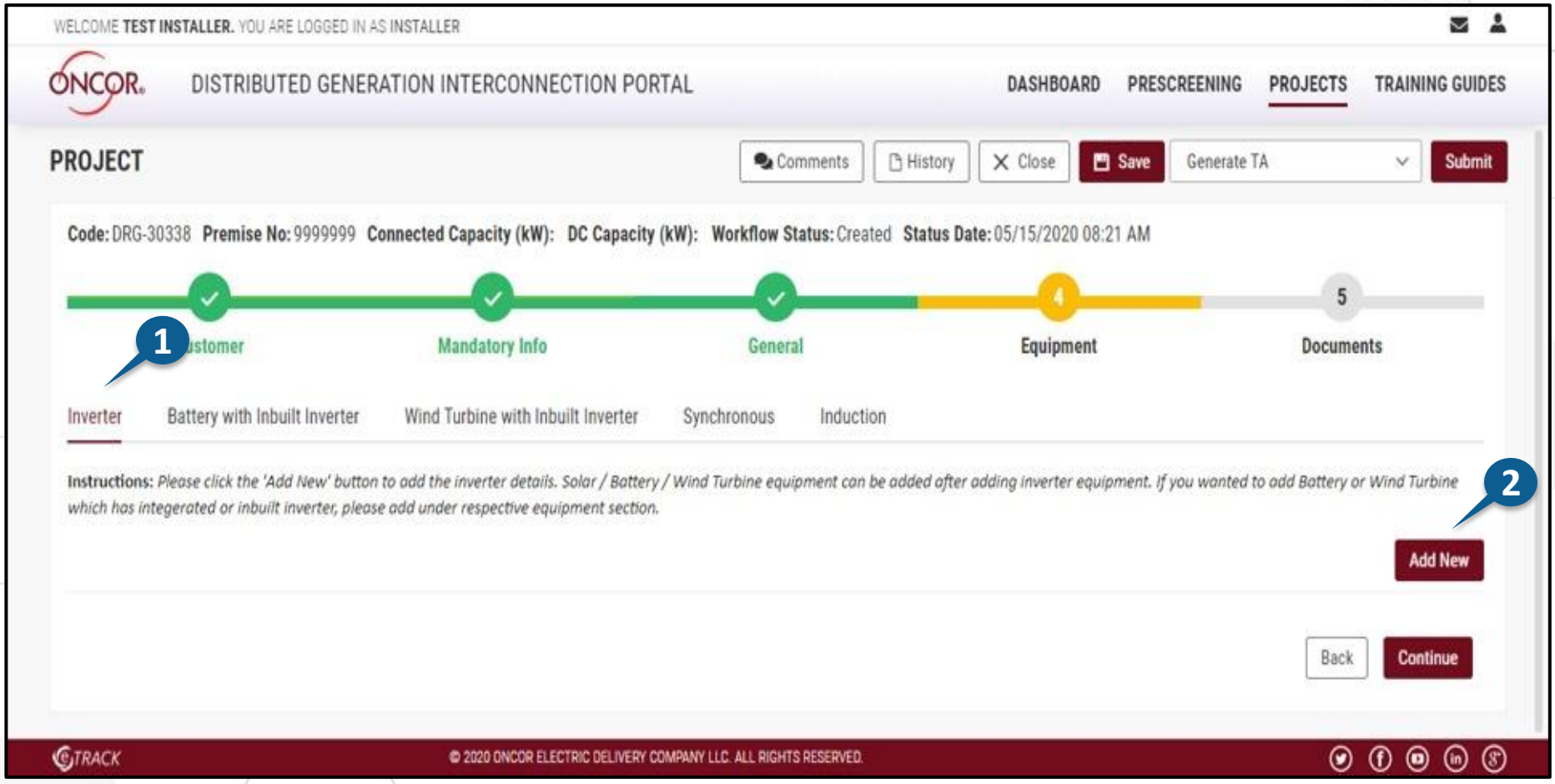
6.4. Equipment Tab (1/6)



1. Select the type of measure
2. Click on **Add New**

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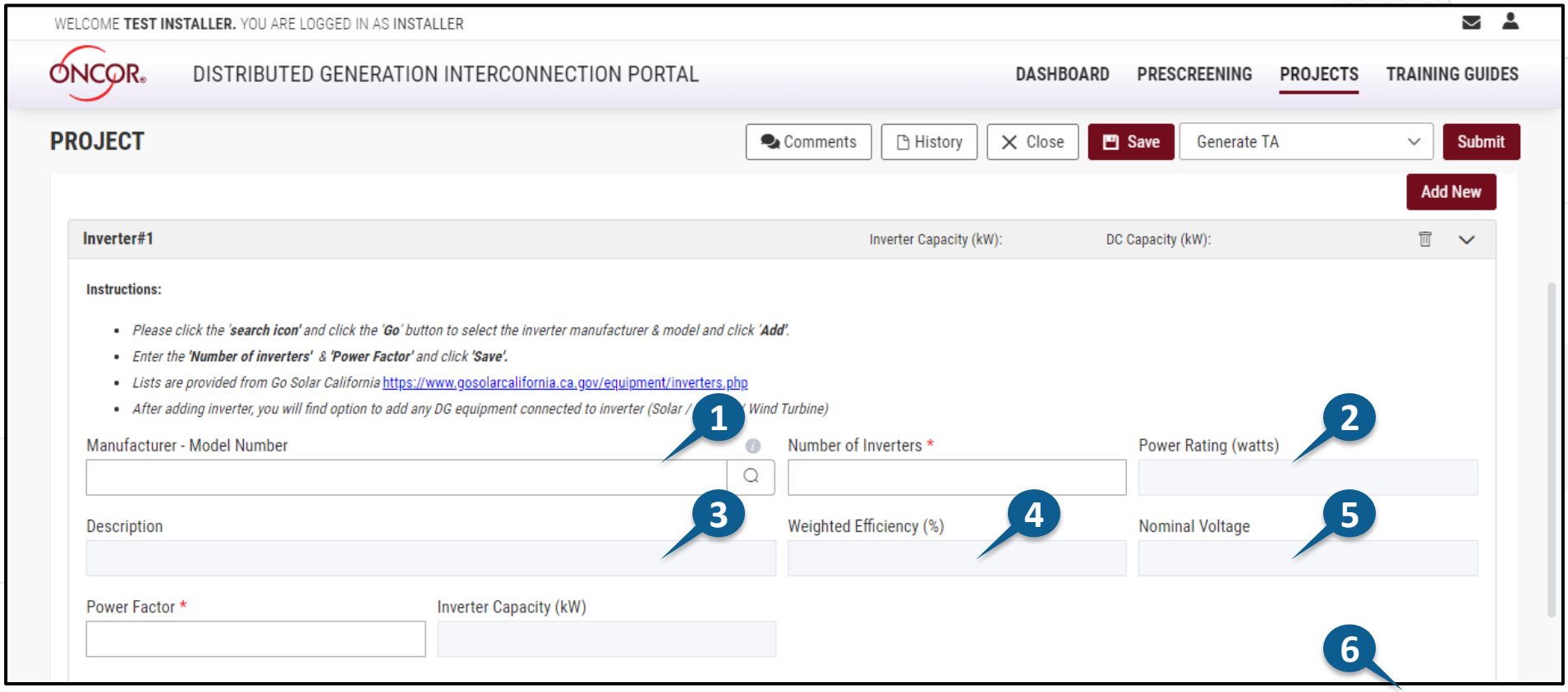
6.4. Equipment Tab (2/6) – Inverter



For Inverter fields, based on selection of **Manufacturer – Model Number (1)** related fields such as **Power Rating (2) Description (3) Weighted Efficiency (4)** and **Nominal Voltage (5)** and Click **Save (6)**.

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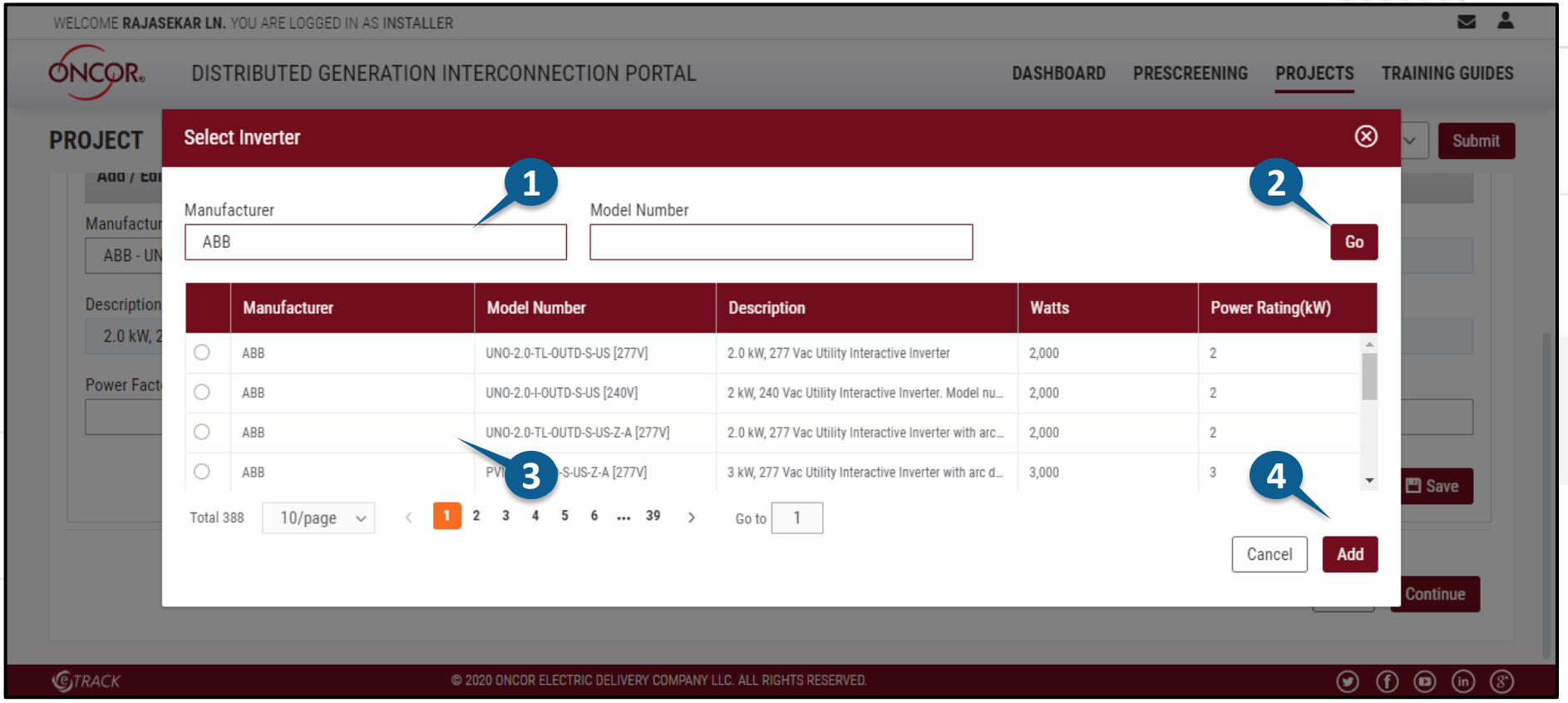
6.4. Adding Measures in Equipment Tab (3/6) - Inverter



1. Enter the required Inverter Manufacturer / Model Number
2. Click Go – To search and fetch the result
3. Select the desired record from the list
4. Click Add

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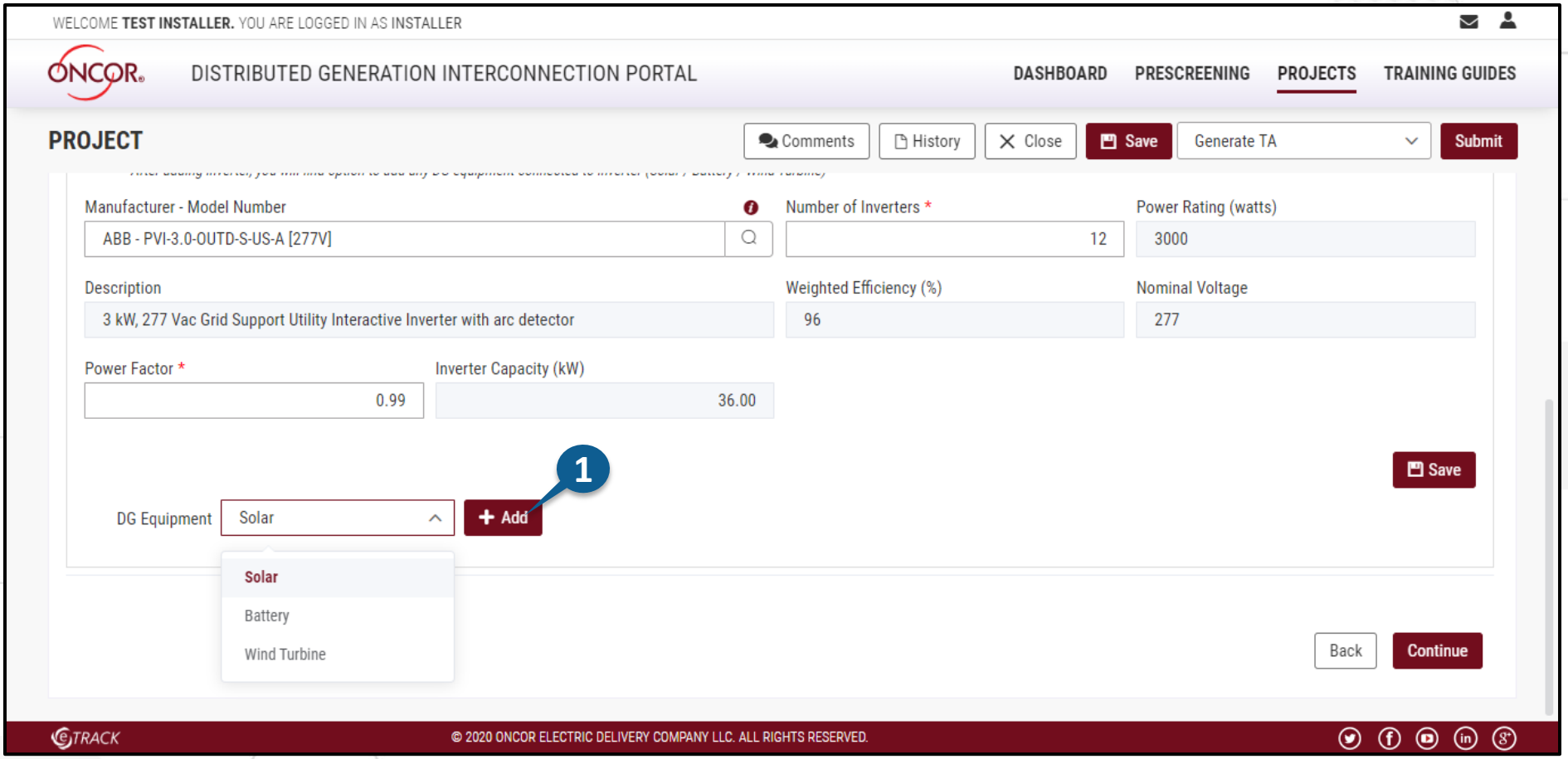
6.4. Equipment Tab (4/6)



1. Choose the child measure from the DG Equipment drop-down and then Click **Add**

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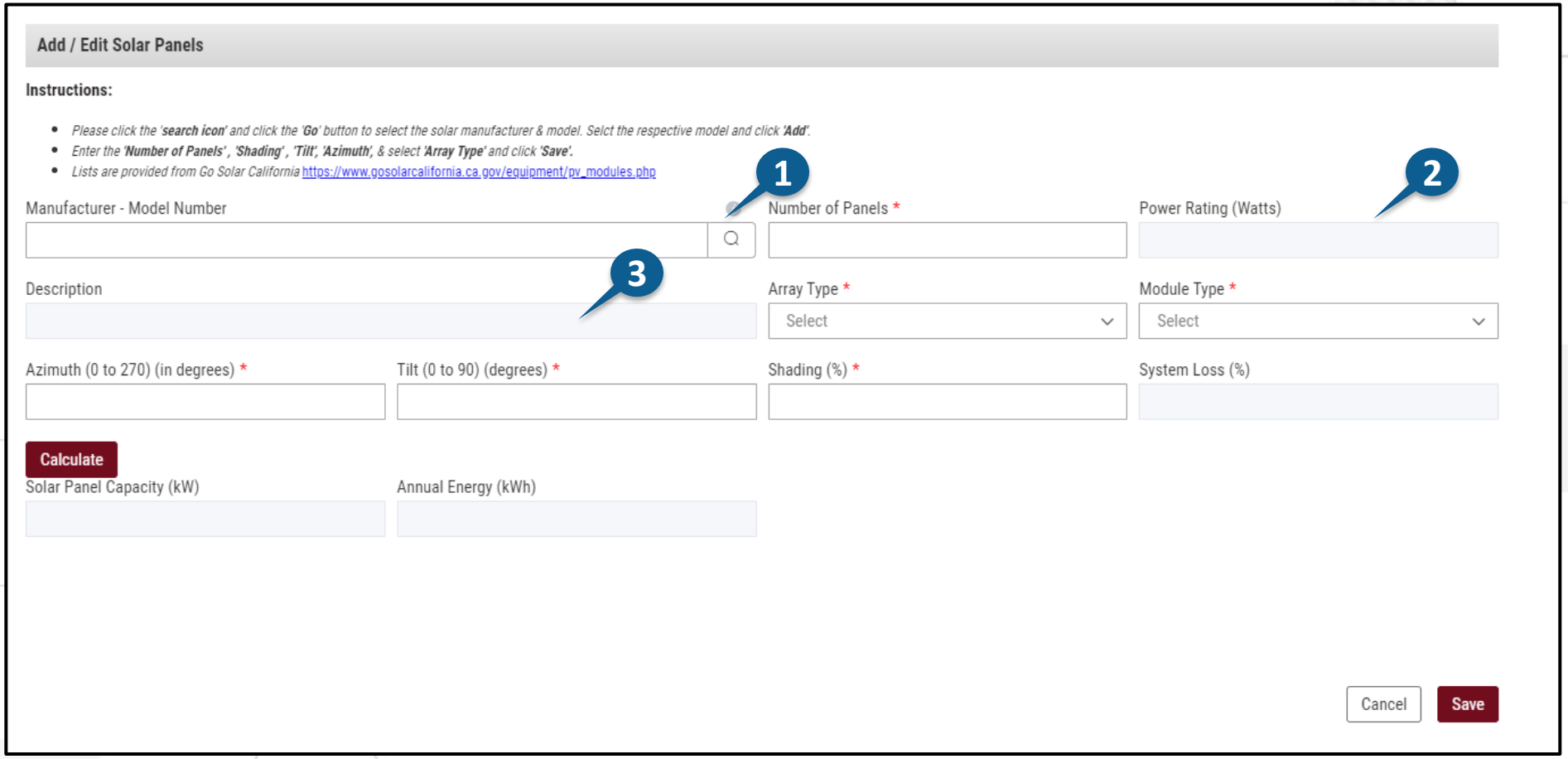
6.4. Equipment Tab (5/6)



For Solar PV fields based on selection of **Manufacturer – Model Number (1)** related fields **Power Rating (2) Description (3)** will be auto populated

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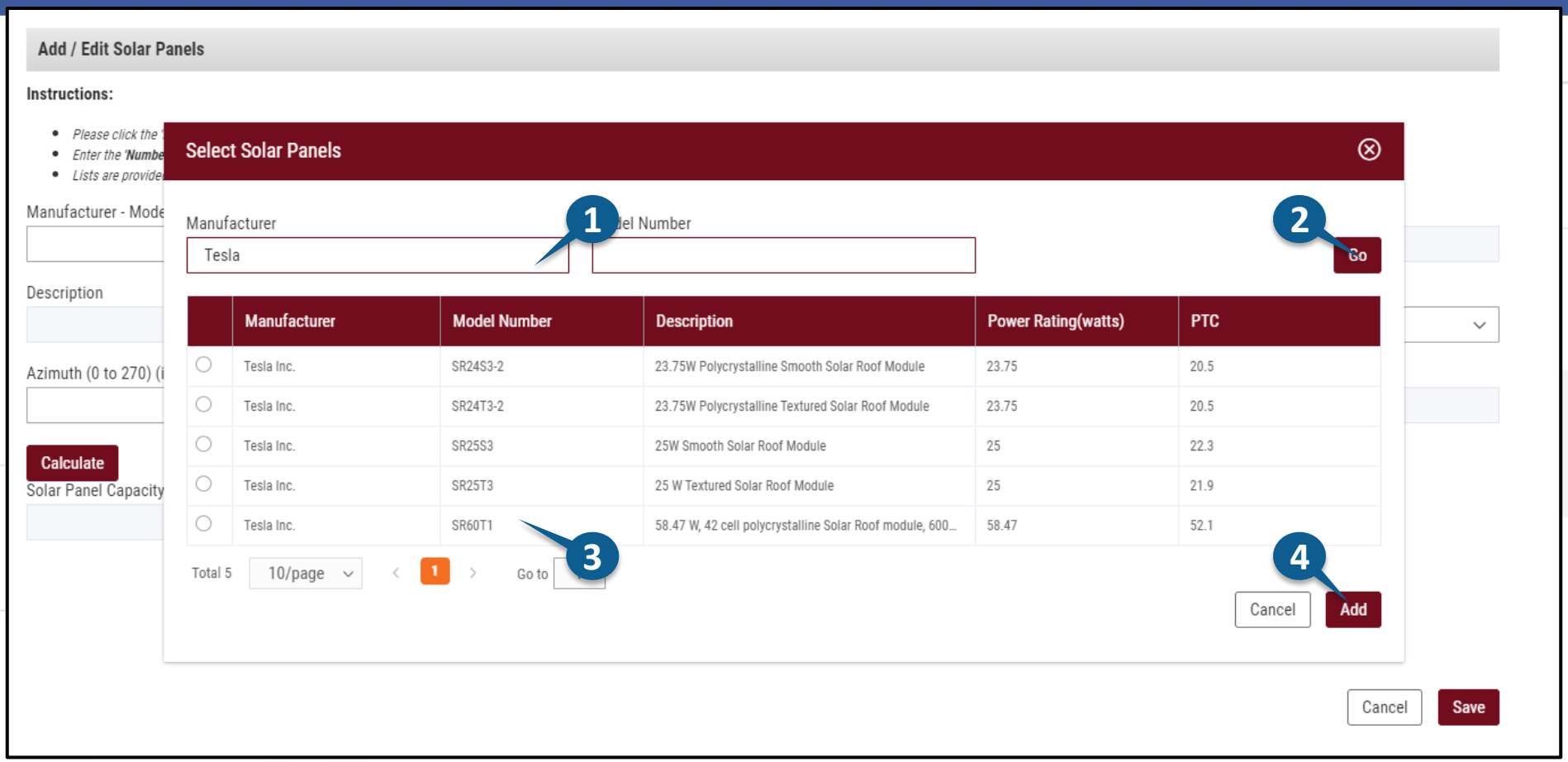
6.4. Equipment Tab (6/6)



1. Enter the required Solar Manufacturer / Model Number
2. Click Go
3. Select the desired record from the list
4. Click Add and save and continue

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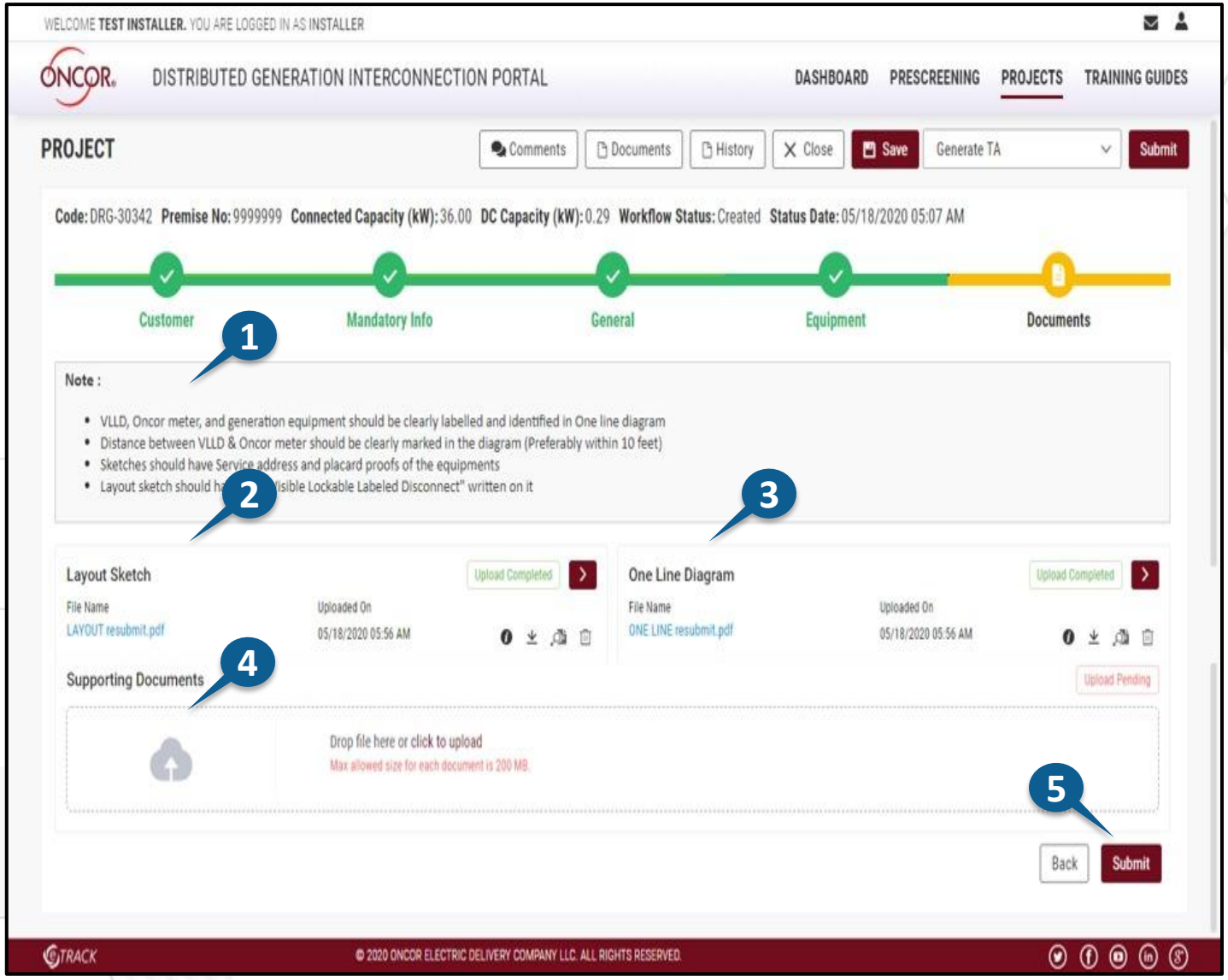
6.5 Documents Tab



1. **Note**: Gives the Information about all the document specifications.
2. Upload **Layout Sketch**
3. Upload **One Line Diagram**
4. Upload **Supporting Documents** (if any)
5. Click **Submit**

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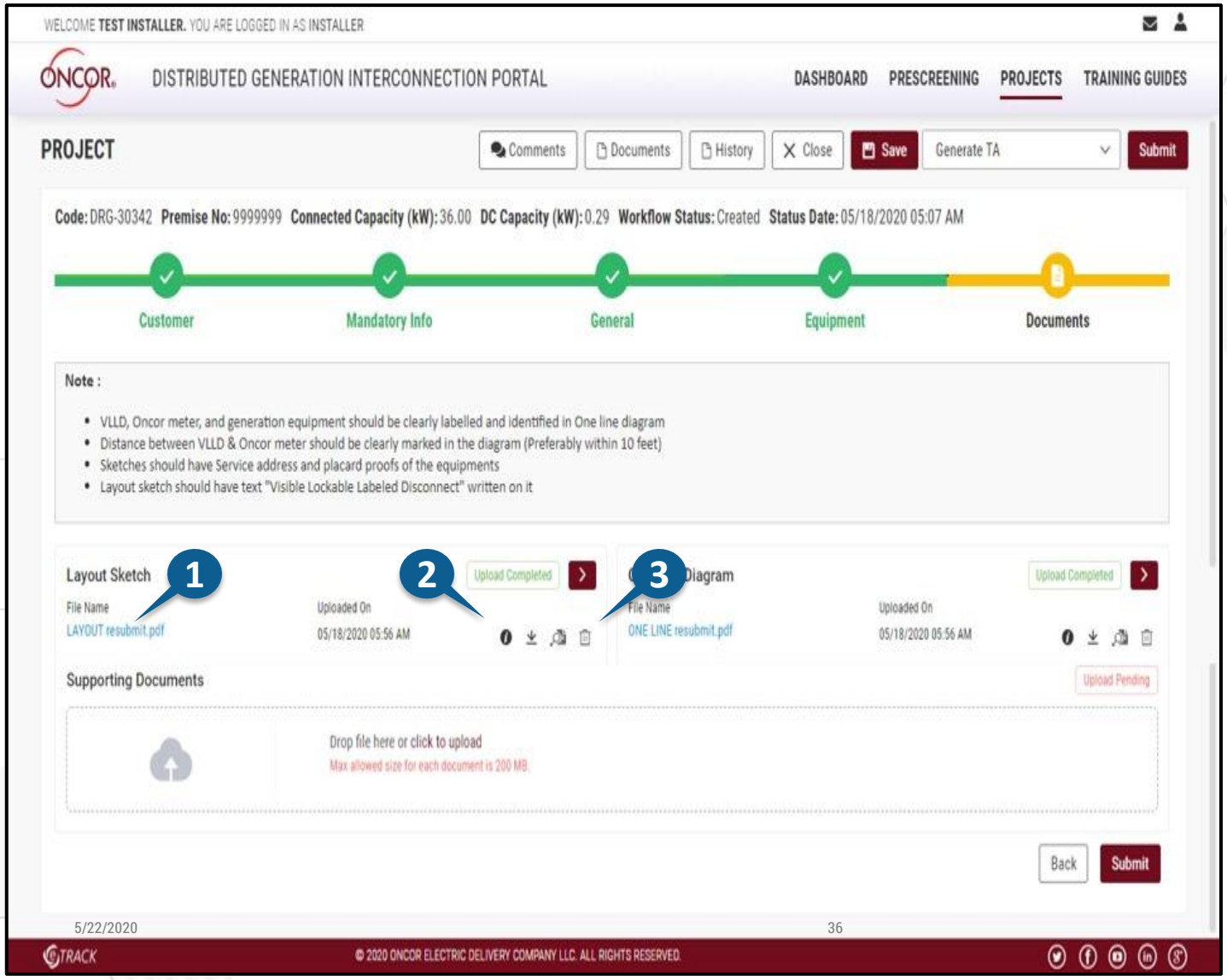
6.5 Documents Tab - Preview



1. Document Preview: Clicking on the uploaded document file – Displays the preview of file.
2. Info Icon: Provides the uploaded by, document type and document name information.
3. Trash can icon: Allows the user to delete the uploaded file

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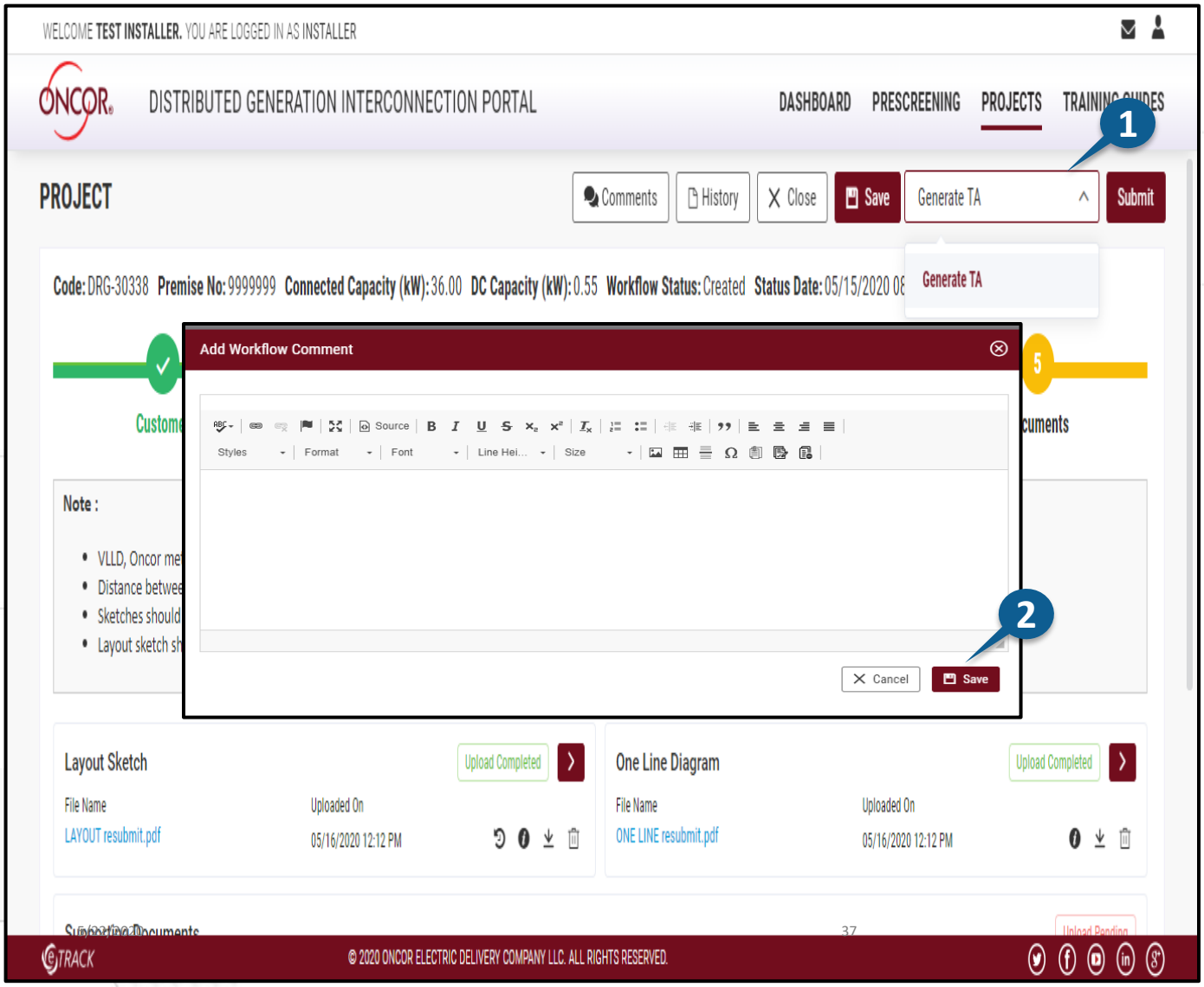
6.7 Workflow Movement



1. Change the workflow from the drop-down and Click on **Submit**
2. Provide workflow comments in the pop-up window and click on **Save**

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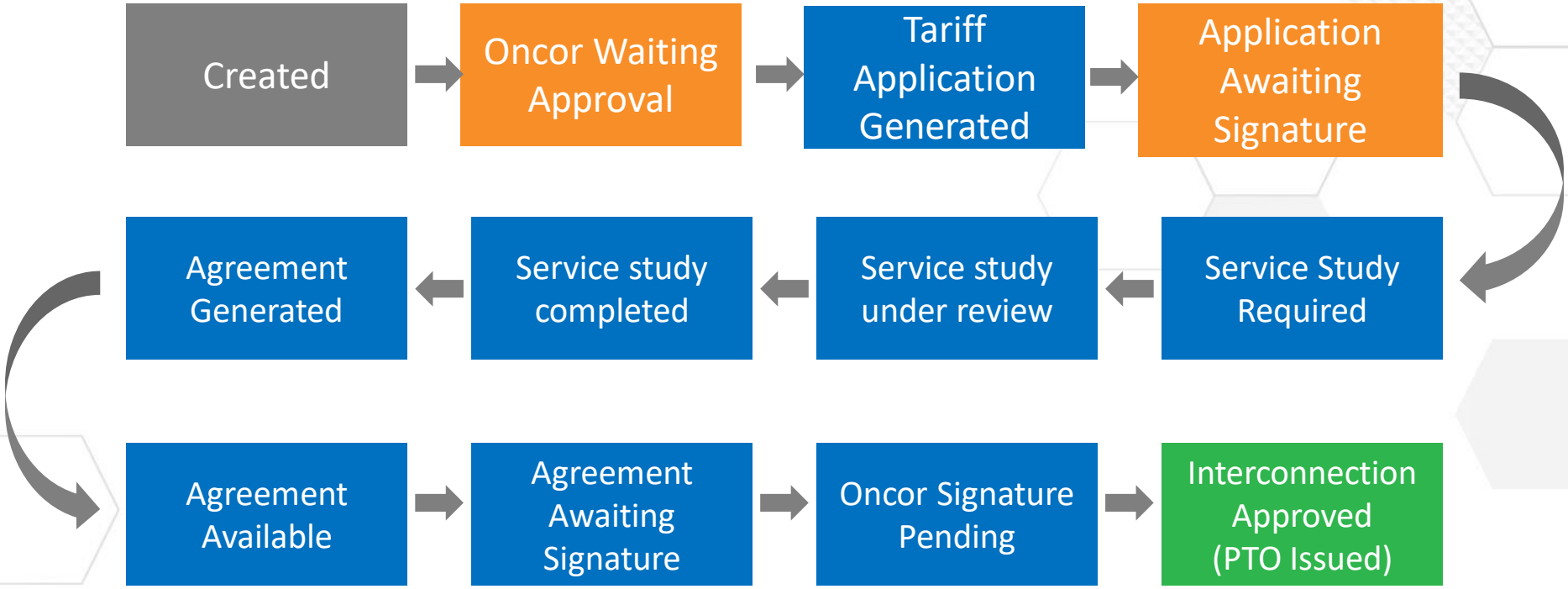
7. HIGH LEVEL CHANGES

7.1 Workflow Change



- Oncor Waiting Approval occurs only if it is a duplicate project
- Application Awaiting signature- eSignature
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- Agreement Awaiting Signature – “Account holder is system owner” option
- TPOS Agreement Awaiting Signature – Other options of IA Entity Type

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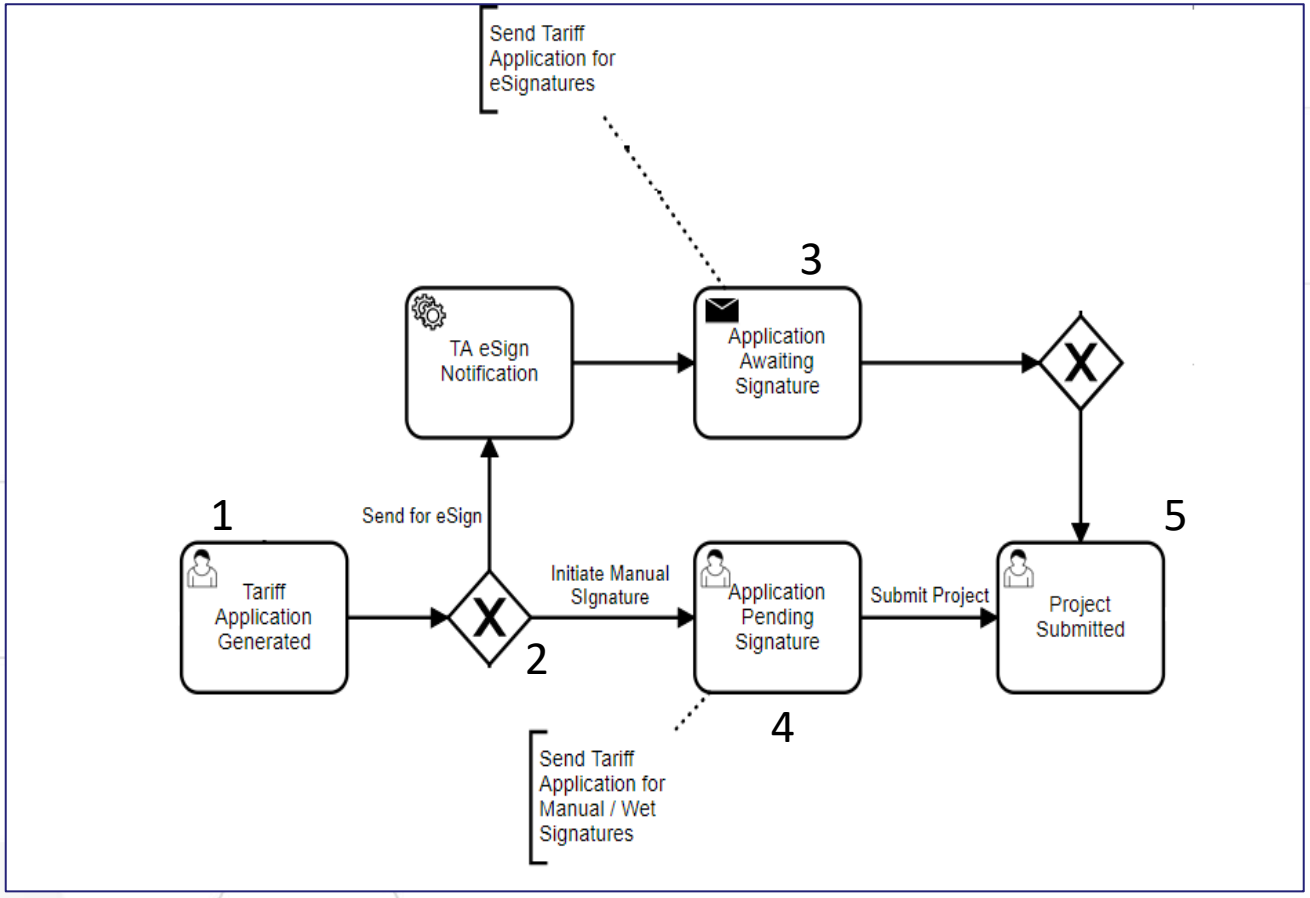
7.1 Tariff Application Part



Step 1: Tariff application has been generated

Step 2: Installer has the option to chose either eSignature or Initial manual signature

Step 3:Application Awaiting signature status – Waiting on the customer to eSign the document. Once customer sign it moves to Step 5

Step 4: Application Pending signature- Upload the hardsigned copy and move the workflow to 5.

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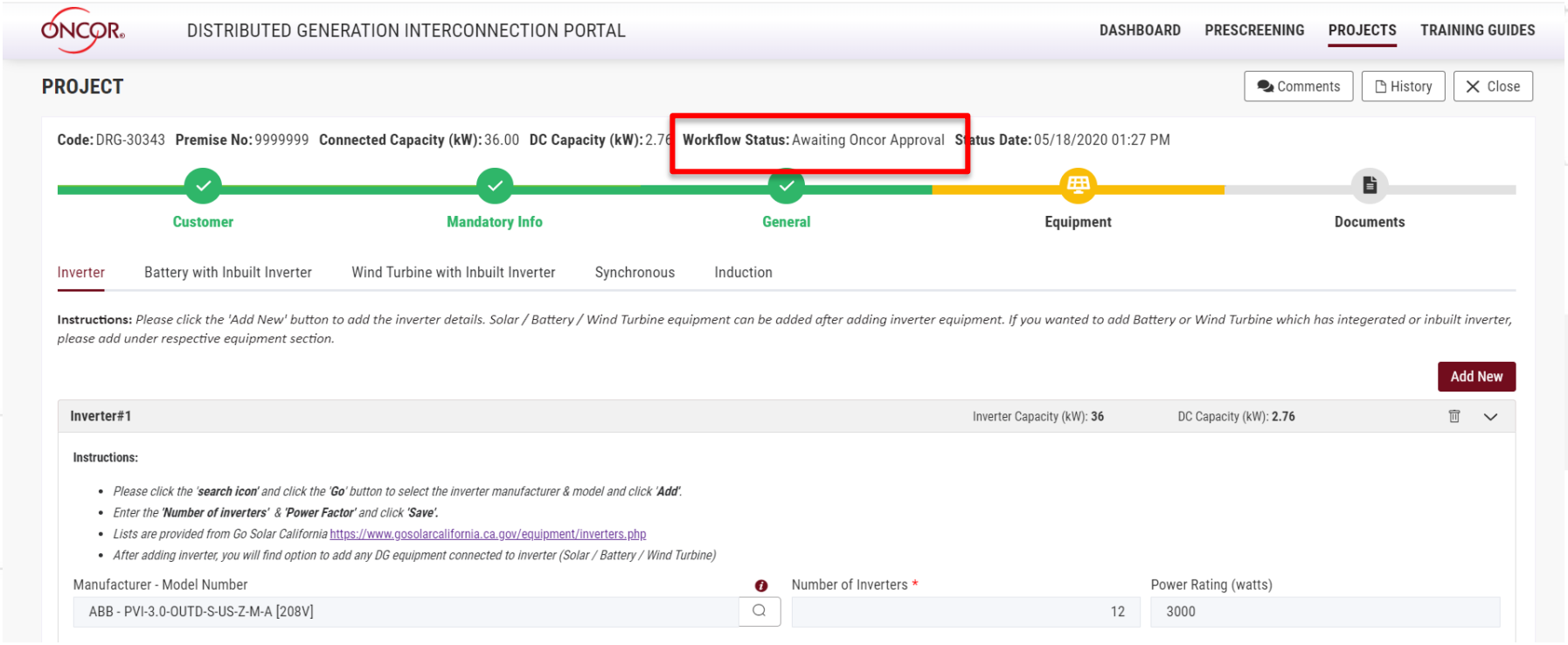
7.2 Duplicate Check



Duplicate project- Awaiting Oncor Approval status means there is a duplicate project and waiting on Oncor team to approve.

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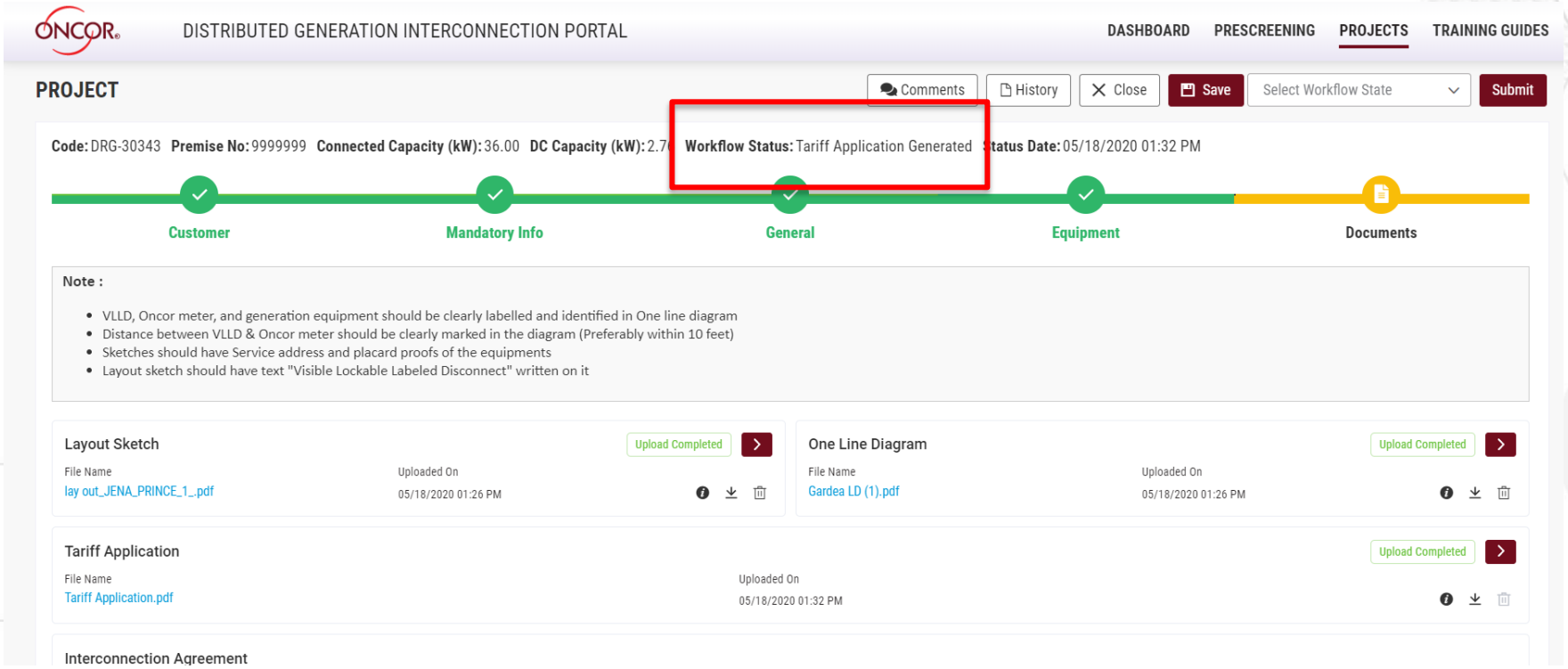
7.3 Duplicate Approval



Duplicate Approval- Once Oncor review team approves the duplicate. The status will be moved to tariff application Generated. Use the workflow to proceed the project

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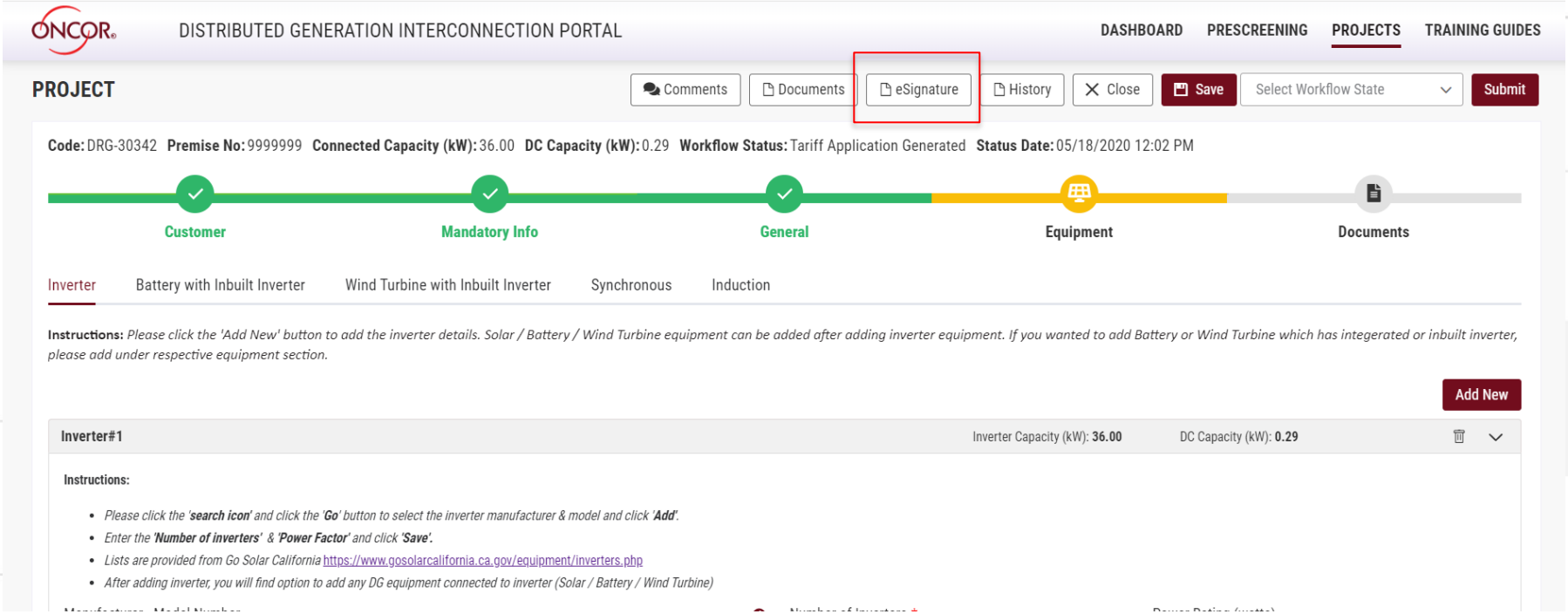
7.4 eSignature Tab



Click on the eSignature tab to see the eSignature status.

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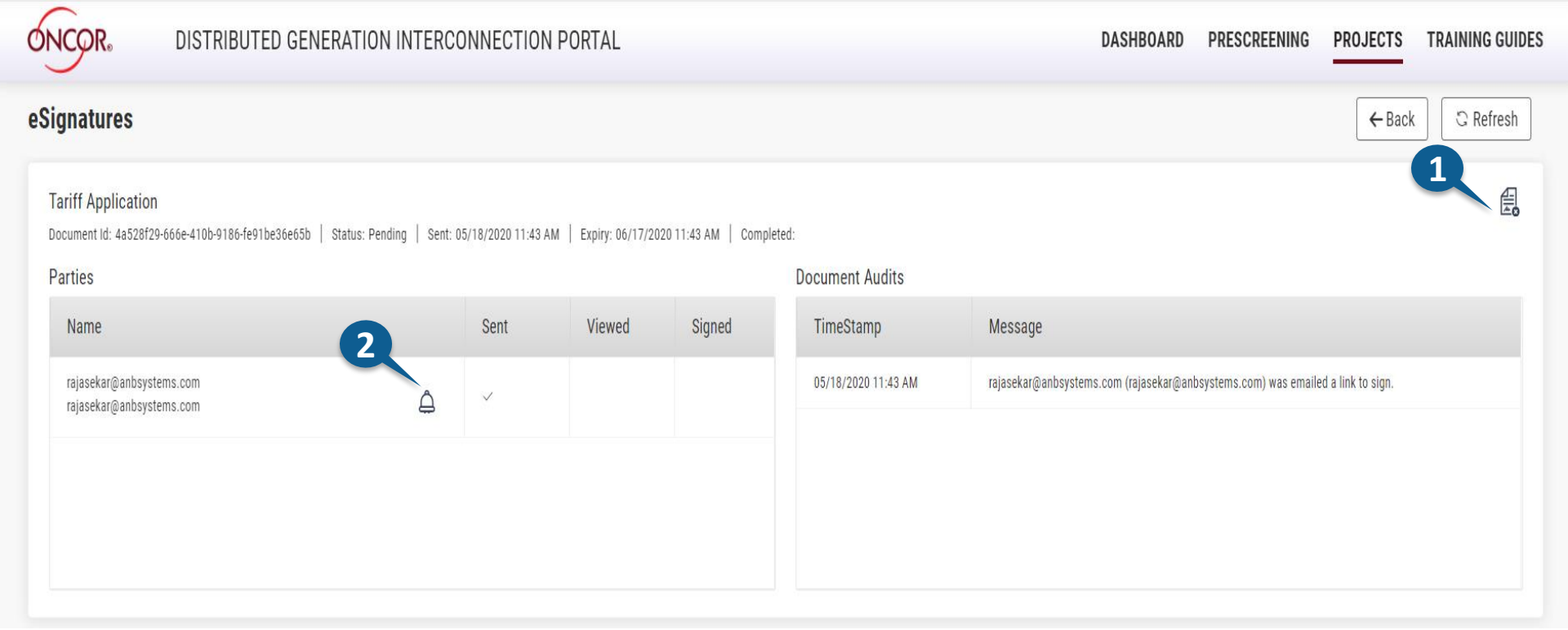
7.4 eSignature Tab



1. Void Document – Installer can void the document and set the status back to the Agreement available/tariff application generated status to resend for eSignature or initiate manual signature.
2. Please use bell icon to send Reminder email to the customer for eSignature

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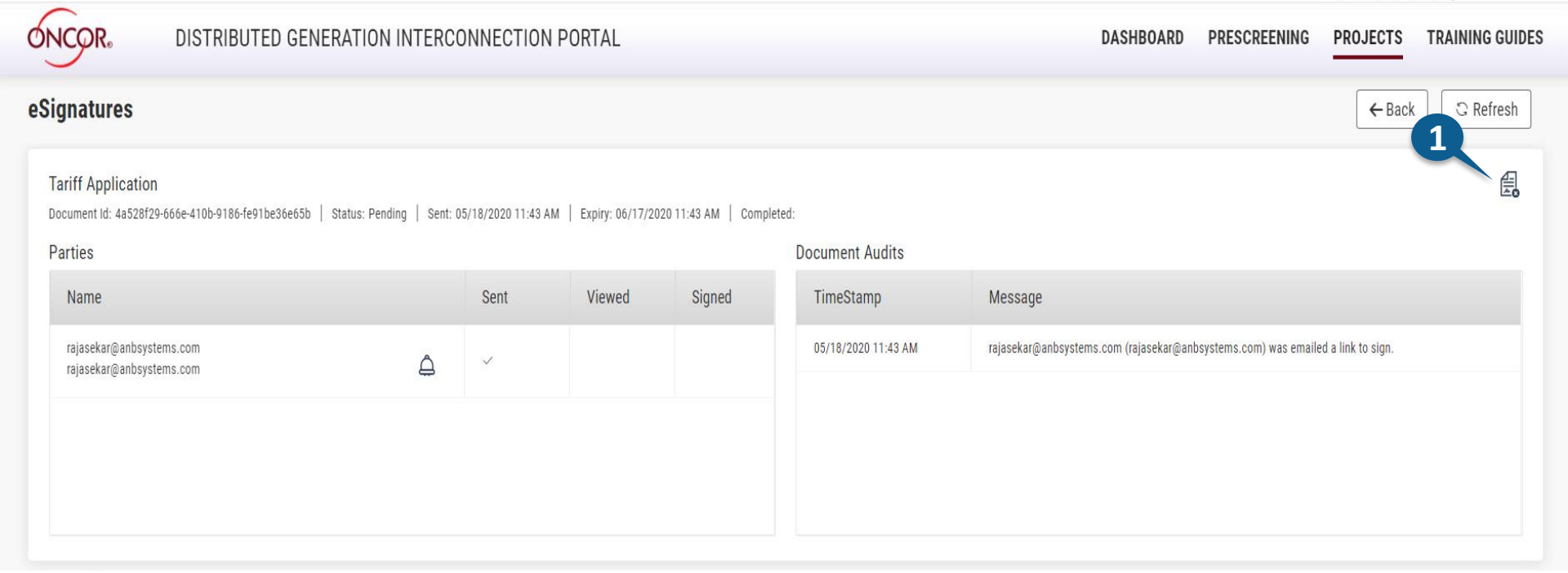
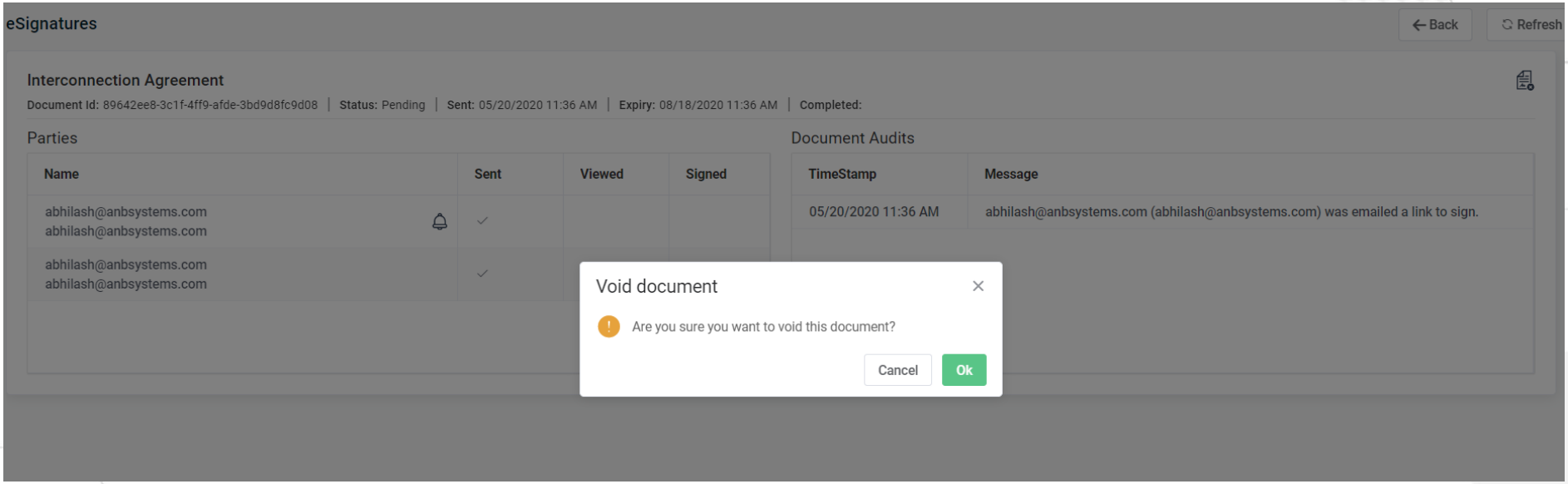
7.4 eSignature Tab – Void Option



1. Click on the void button. It will void the document will take back the workflow to move forward

7.4 eSignature Tab – Void Option



1. Click Yes.
2. The project status will be reverted to Previous Status
    1. For Applications – Tariff application Generated
    2. For Agreement- Interconnection Agreement Available

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8. EQUIPMENT LIST – INVERTER & SOLAR PV

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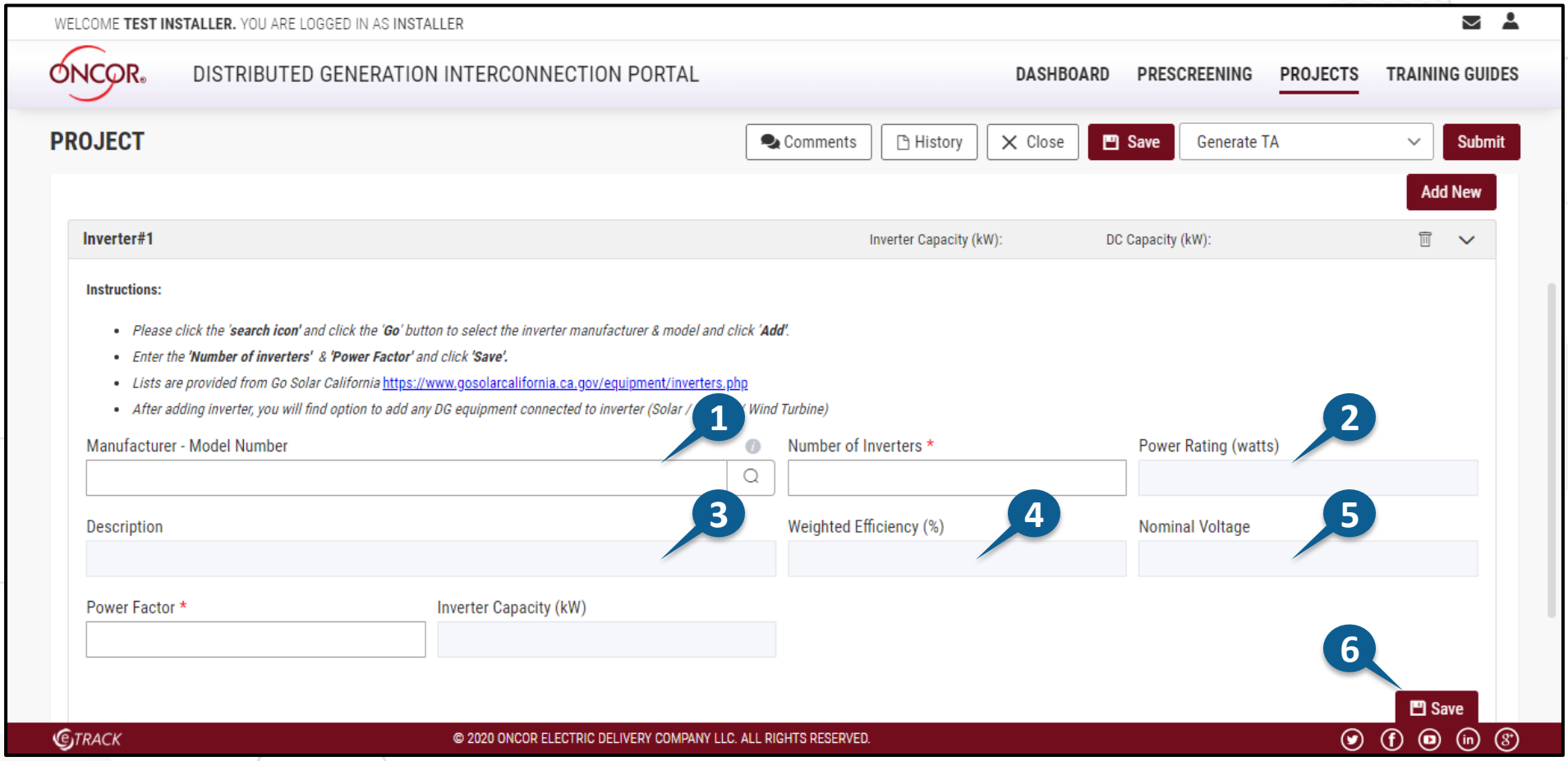
8.1 Equipment List - Inverter



For Inverter fields, based on selection of **Manufacturer – Model Number (1)** related fields such as **Power Rating (2) Description (3) Weighted Efficiency (4)** and **Nominal Voltage (5)** will be auto populated. And Click **Save (6)** to save the Inverter measure.

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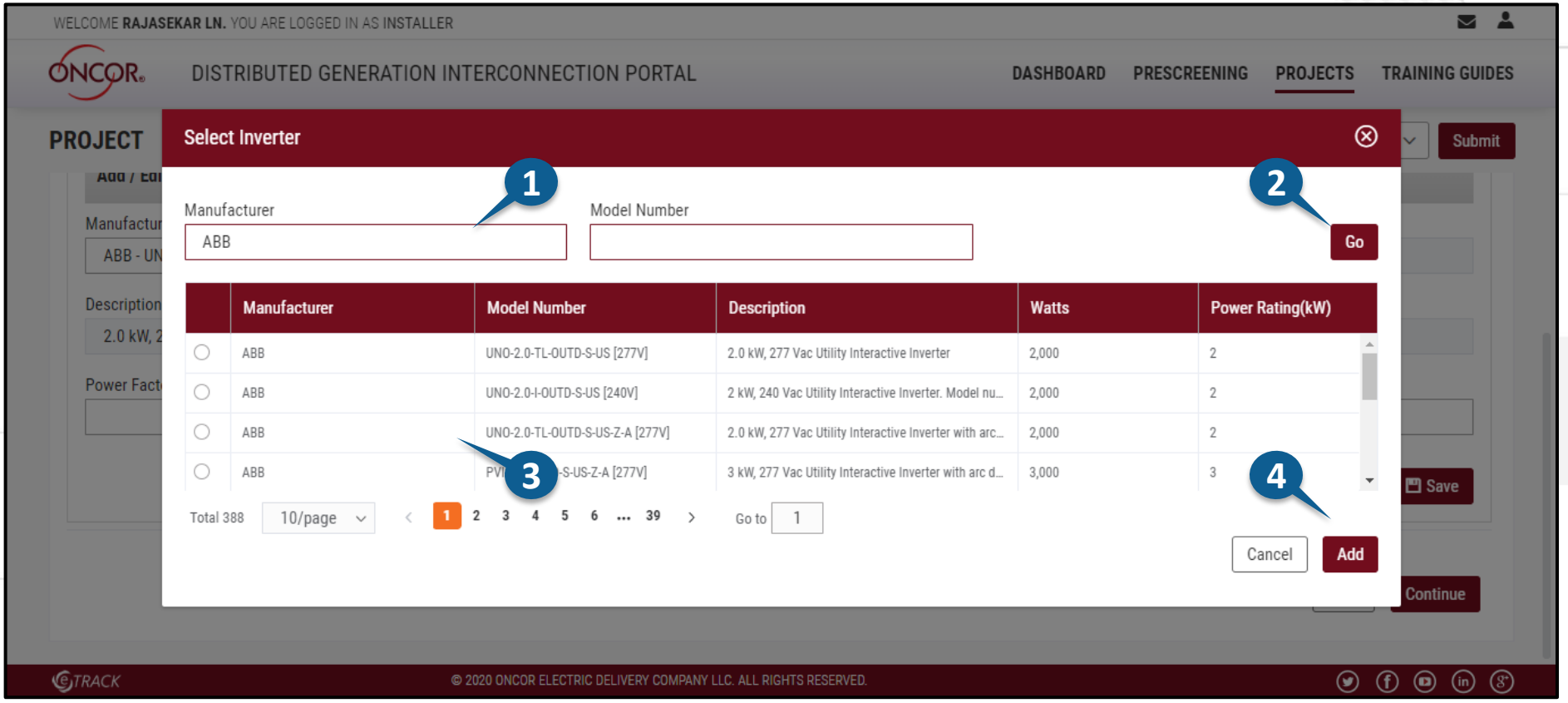
8.2. Equipment List - Inverter



1. Enter the required Inverter Manufacturer / Model Number
2. Click Go – To search and fetch the result
3. Select the desired record from the list
4. Click Add

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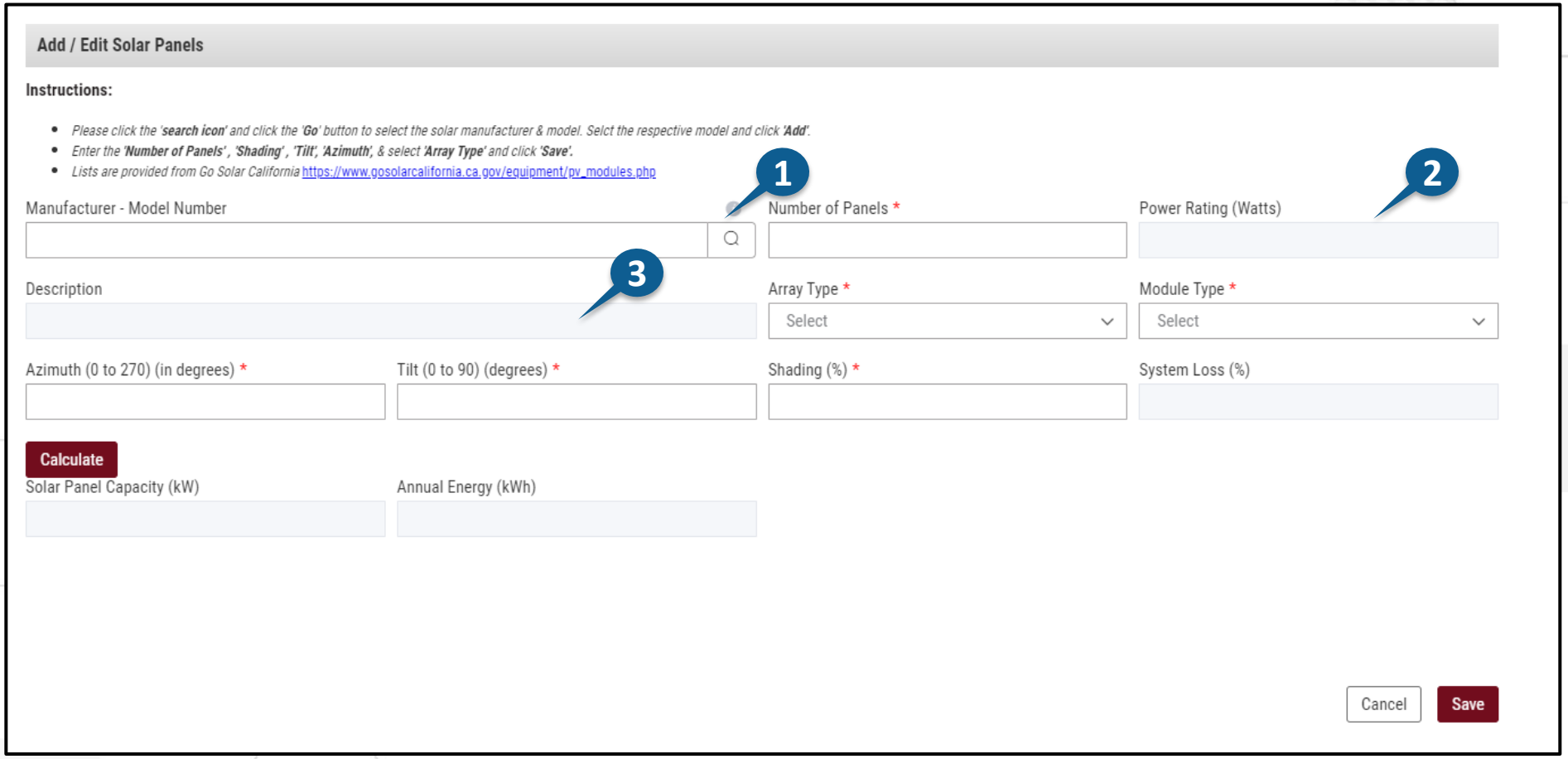
8.3 Equipment List - Solar PV



For Solar PV fields based on selection of **Manufacturer – Model Number (1)** related fields **Power Rating (2) Description (3)** will be auto populated

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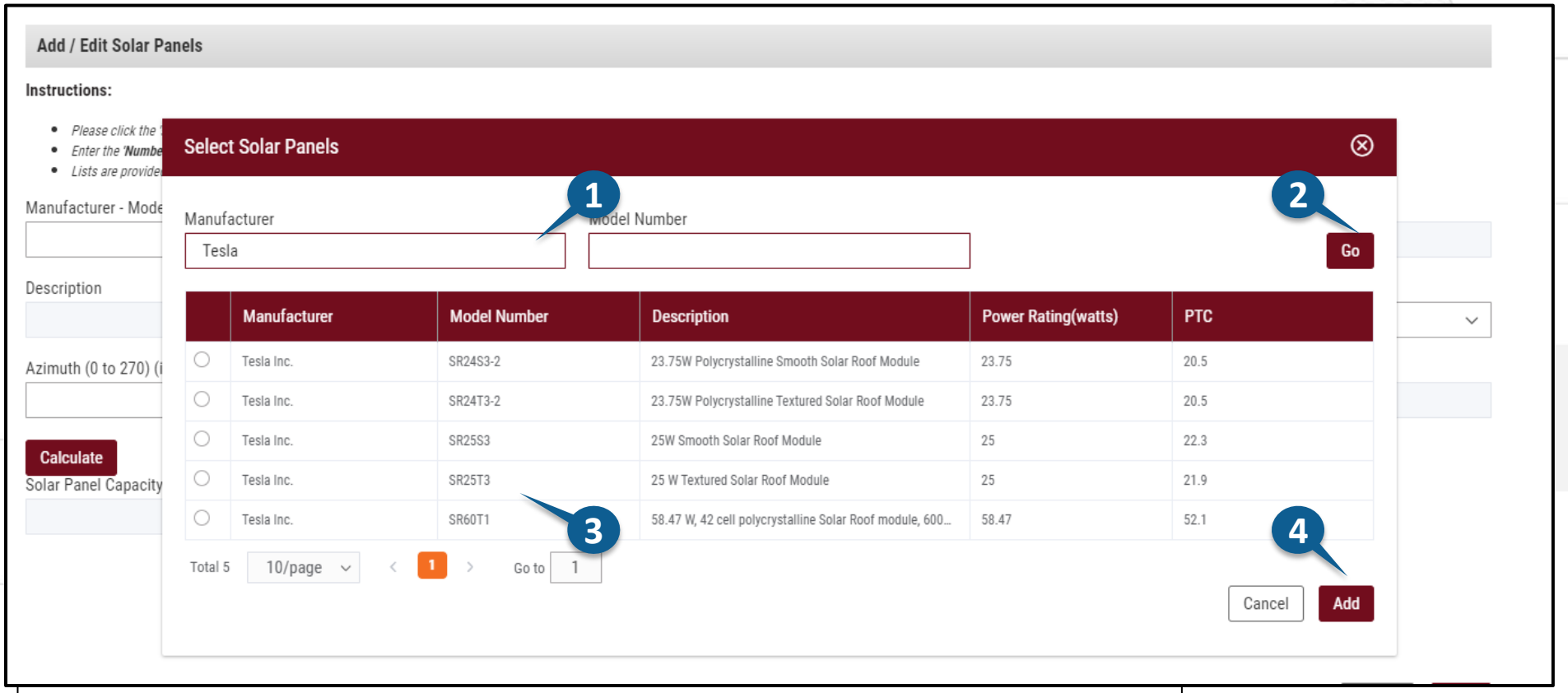
8.4 Equipment List – Solar PV



1. Enter the required Solar Manufacturer / Model Number
2. Click Go
3. Select the desired record from the list
4. Click Add and save and continue

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THANK YOU!

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