

Oncor Distribution Generation Installer Portal Training Guide



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1. Introduction to Oncor DG Portal

The screenshot shows the Oncor Distributed Generation Interconnection Portal. At the top left is the Oncor logo and the text "DISTRIBUTED GENERATION INTERCONNECTION PORTAL". Below this is a large image of a smiling man wearing a white hard hat and safety glasses. To the right of the image is a "SIGN IN TO YOUR ACCOUNT" form with fields for "User ID" and "Password", and buttons for "NEW INSTALLER SIGN UP" and "SIGN IN". Below the sign-in form are four service tiles: "Solar Brochure", "Oncor FAQs", "Training Guide", and "DG Project Requirements". A "HOW IT WORKS" section follows, showing a four-step process: "Apply", "Sign", "Operate", and "Metering". Below this is a paragraph of text: "Once the Interconnection Application is received by CenterPoint Energy through eTRACK or non-eTRACK methods. CenterPoint Energy will screen it for acceptance or notify of objections, perform system impact review, followed by preparation and approval of Interconnection Agreement." At the bottom, there is a "NEW AND EVENTS" section and a footer with social media icons and the text "Help / Training Guide | FAQs".

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



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



2. Oncor DG Portal Landing Page



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

- **Solar Brochure:** It has the 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



2.1 Registration Page

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

Installer Registration

Company Information

Organization Name Federal Tax ID Email Address Work Phone

Address City State

Zip Code Fax

Contact Information

First Name Last Name Email Address Desired User ID

Phone Number Extension Mobile Number

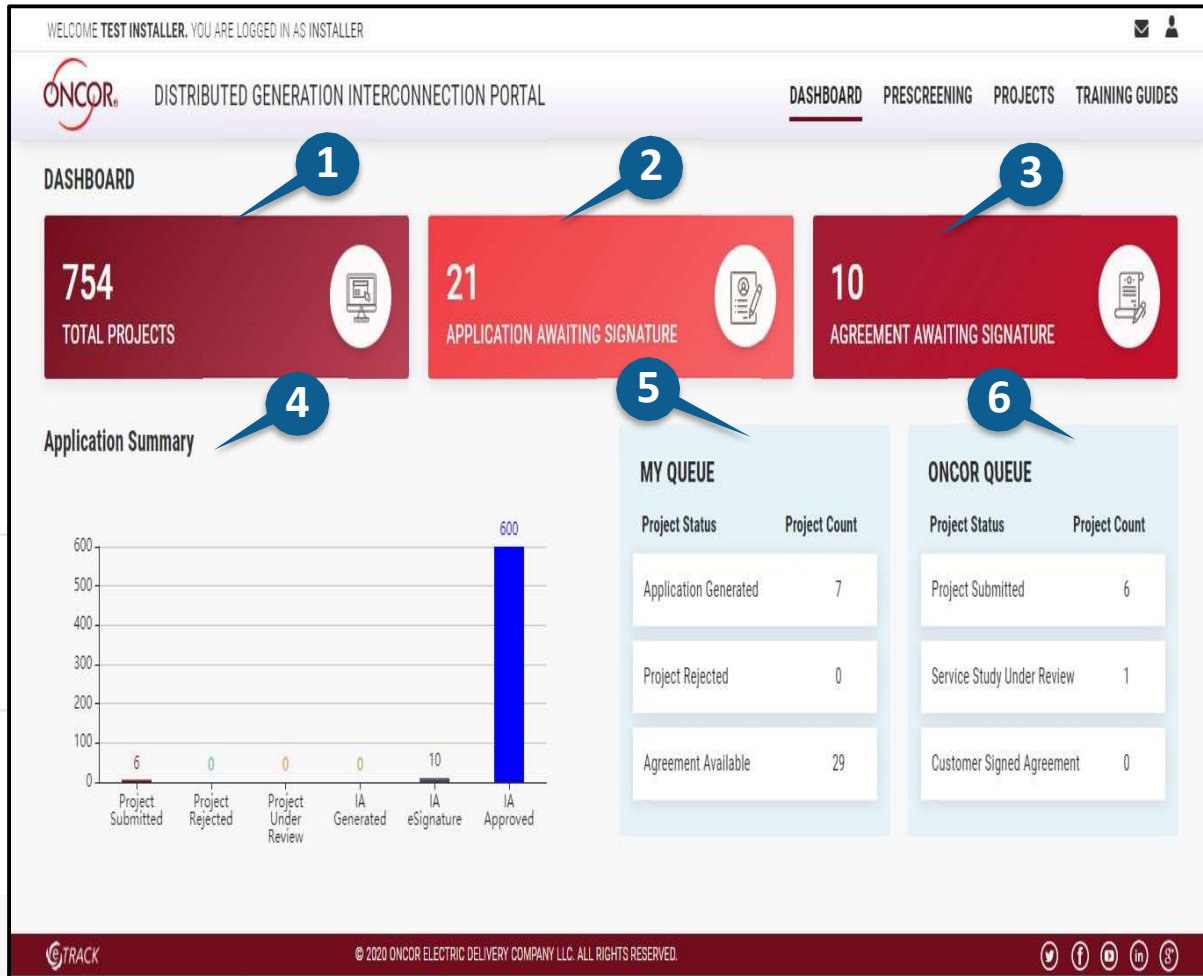
Project Participation Interest

Small System Large System

[Help / Training Guide](#) | [FAQs](#)

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

2.2 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

2.3 Project List Page

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT

Project Name Type here to search

System Type *

Code	City	State	Connected Capacity (kW)	DC Capacity (kW)
DRG-30327	IRVING	TX	12.09	6.96
DRG-30316	FORT WORTH	TX	11.39	15.08
DRG-30306	CARROLLTON	TX	4.08	
DRG-30305	GREENVILLE - SU	TX	7.20	
DRG-30304	FORT WORTH	TX	3.36	
DRG-30263	ARLINGTON	TX	7.62	

Total 754 ...

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- 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 dropdown:** 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

2.4 Project Tabs Navigation

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT

Code: DRG-30337 Promise No: 9999999 Connected Capacity (kW): DC Capacity (kW): Workflow Status: Created Status Date: 05/03/2020 03:38 AM

Customer Mandatory Info General Equipment Documents

* Type of Entity (Ownership) Account holder is system owner

Owner of the Renewable System

Legal Name (System Owner/Customer) System Owner Email DBA (If Applicable) System owner entity type

John Doe rajasekar@anbsystems.com Individual

End-Use Customer Information

End use customer name End use customer Email End use customer entity type

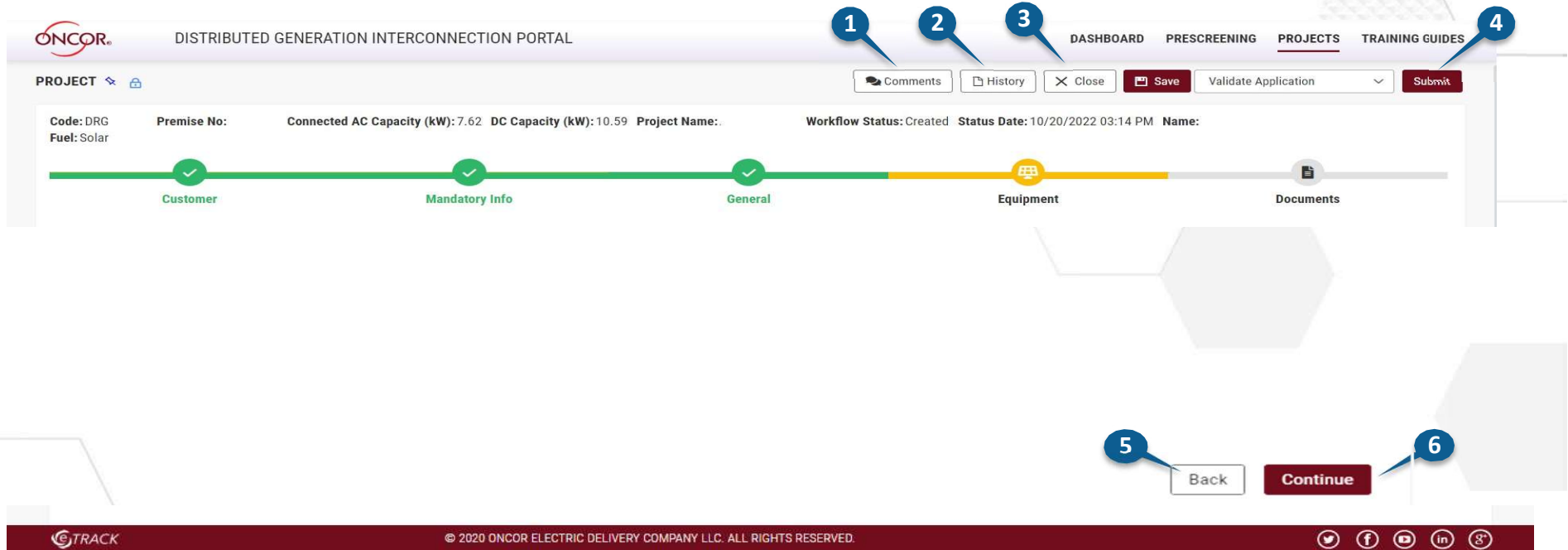
John Doe rajasekar@anbsystems.com Individual

Premise Owner Information

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- 1. Green color with “Check” mark** represents that the information in that 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

2.5 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


2.6 Add Comments







The screenshot displays the ONCOR Distributed Generation Interconnection Portal. At the top, it says "WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER". The main navigation bar includes "ONCOR", "DISTRIBUTED GENERATION INTERCONNECTION PORTAL", and tabs for "DASHBOARD", "PRESCREENING", "PROJECTS", and "TRAINING GUIDES". A "Comments" sidebar on the left has a "User" dropdown. The central focus is a red "Add Comment" dialog box with a close button (X) in the top right. Inside the dialog, there is a rich text editor toolbar with options for bold, italic, underline, strikethrough, subscript, and superscript, along with alignment and list tools. Below the toolbar is a large text input area. At the bottom of the dialog are "Cancel" and "Save" buttons. The background shows a "Close" button and a "+ Comment" button. The footer contains the TRACK logo, copyright information "© 2020 ONCOR ELECTRIC DELIVERY COMPANY LLC. ALL RIGHTS RESERVED.", and social media icons for Twitter, Facebook, YouTube, LinkedIn, and GitHub.

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

2.7 Comments – Timeline View

Transition History View ✕

Total Elapsed Time: 1 Day Timeline Process Flow 

05/16/2020 12:30 PM	 Waiting...	 1	Workflow Status Awaiting Oncor Approval	Owner Installer, Installer Master, Test Installer	Total Elapsed Time --	SLA 1 days	
05/15/2020 08:21 AM	 05/16/2020 12:30 PM	 1	Workflow Status Created	Owner Installer, Installer Master, Test Installer	Total Elapsed Time 1 day	SLA --	

2.8 Account Menu Bar

The screenshot shows the ONCOR Distributed Generation Interconnection Portal. At the top, it says "WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER". The main navigation bar includes "DASHBOARD", "PRESCREENING", and "PROJECTS". A user menu is open in the top right corner, containing "Profile", "My Organization", and "Sign Out". A blue circle with the number "1" points to the user menu icon. Below the navigation bar, there are buttons for "Comments", "History", "Close", "Save", and "Generate TA". The project details section shows: Code: DRG-30337, Premise No: 9999999, Connected Capacity (kW): 36.00, DC Capacity (kW): 0.29, Workflow Status: Created, Status Date: 05/15/2020. A progress bar has five steps: 1. Customer (highlighted in yellow), 2. Mandatory Info, 3. General, 4. Equipment, and 5. Documents. Below the progress bar, there are input fields for Code, Project Name, Installer, and Requested Energization Date. The "Customer Information" section includes fields for Premise No, Customer Name, Service Address, Additional Name, Phone Number, and Email Address.

1. Click to User Menu Icon (To access) below:

- **My profile**
- **Announcements**
- **Sign Out**

2.9 My Profile

WELCOME **RAJASEKAR LN**. YOU ARE LOGGED IN AS INSTALLER

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS**

Profile
My Organization
Sign Out

RL Rajasekar LN
Installer
Change

a **b** **c**

My Profile

Cancel Save

Details Contact Details Change Password

First Name *
Rajasekar

Middle Name

Last Name *
LN

User ID *
rajinstaller

Organization *
Oncor Electric Delivery

Gender

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1. Click on My Profile

- a. View Personal Details
- b. View Contact Details
- c. Change the Password

2.10 My Organization

WELCOME RAJASEKAR LN. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING PROJECTS

Profile
My Organization
Sign Out

Edit Organization

General Address Users

Organization Type *
Utility

Name *
Oncor Electric Delivery

Federal Tax Id *
43-2432432

Contact Name

Email ID

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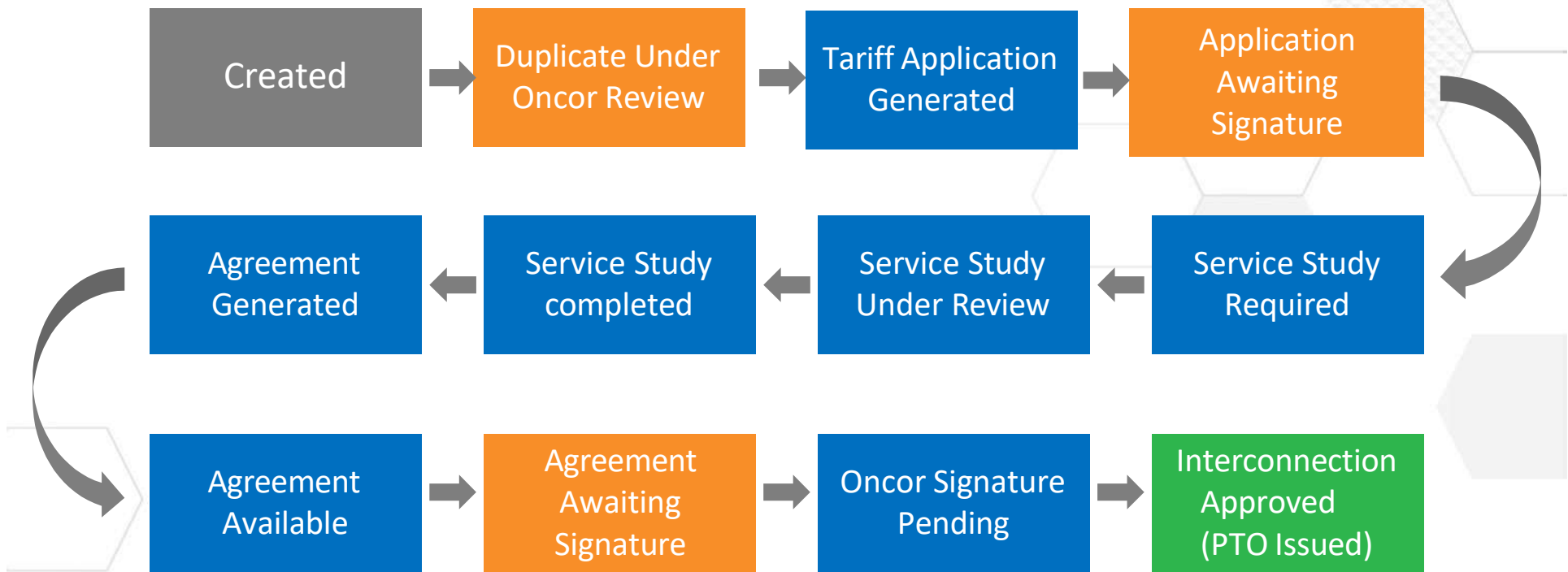
- a. View Organization Information
- b. Add/Edit/Delete the Billing Address
- c. Add new users, Edit/Delete existing users, View current users and Reset their Password





3. PROJECT WORKFLOW

3. Small Systems Workflow



- Duplicate Under Oncor Review 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

3.1 Hardcopy Tariff Process

WELCOME ONCOR DG. YOU ARE LOGGED IN AS INSTALLER MASTER

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Comments History Close Save Select Workflow State Submit

Code: DRG-54168 Premise No: 2025079 Connected AC Capacity (kW): 7.62 DC Capacity (kW): 11.21 Project Name: Cynthia Gutierrez Workflow Status: Tariff Application Generated Status: Initiate Manual Signature Send for eSign Regenerate Tariff Application

Name: Get Solarize

Customer Mandatory Info General Equipment Documents

Note :

- VLLD, Oncor meter, and generation equipment should be clearly labelled and identified in One line diagram
- Distance between VLLD & Oncor meter should be clearly marked in the diagram (Preferably within 10 feet)
- Sketches should have Service address and placard proofs of the equipments
- Layout sketch should have text "Visible Lockable Labeled Disconnect" written on it

Layout Sketch Upload Completed > One Line Diagram Upload Completed >

File Name Uploaded On File Name Uploaded On

- Installer has the option to Initiate Manual signature or send for esign
- If the installer is selecting **Initiate Manual signature**
 1. Select **Initiate Manual Signature** workflow drop down and proceed.
 2. Upload customer signed copy in the documents tab under **Customer Signed Application** section and submit.
 3. Please make sure the document is **hand/wet signed, scanned and then uploaded**, computer generated signature will **not** be accepted.

3.2 Hardcopy IA submittal Process

The screenshot displays the ONCOR Distributed Generation Interconnection Portal. At the top, it says "WELCOME ONCOR DG. YOU ARE LOGGED IN AS INSTALLER MASTER". The navigation bar includes "DASHBOARD", "PRESCREENING", "PROJECTS", and "TRAINING GUIDES". The "PROJECTS" section is active, showing a project with the following details: Code: DRG-56700, Premise No: 3002479, Connected AC Capacity (kW): 3.75, DC Capacity (kW): 4.49, Project Name: Bruce Bergeron, Workflow Status: Agreement Available, and Status Date: 08/20/2023. The workflow progress bar shows five steps: Customer, Mandatory Info, General, Equipment, and Documents. The "Documents" step is currently active and highlighted in yellow. A dropdown menu is open over the "Documents" step, showing two options: "Submit Hardcopy Agreement" and "Send for eSign". Below the progress bar, there is a "Note" section with the following instructions:

- VLLD, Oncor meter, and generation equipment should be clearly labelled and identified in One line diagram
- Distance between VLLD & Oncor meter should be clearly marked in the diagram (Preferably within 10 feet)
- Sketches should have Service address and placard proofs of the equipments
- Layout sketch should have text "Visible Lockable Labeled Disconnect" written on it

At the bottom of the screenshot, there are two upload sections: "Layout Sketch" and "One Line Diagram". Both sections show a table with columns for "File Name" and "Uploaded On", and a green "Upload Completed" button with a right arrow.

- Installer has the option to Submit hardcopy signature or send for esign
- If the installer is selecting **Submit Hardcopy signature**
 1. Upload customer signed copy in the documents tab under **Customer Signed Interconnection Agreement** section
 2. Select **Submit Hardcopy Agreement** workflow drop down and proceed
 3. Please make sure the document is **hand/wet signed, scanned and then uploaded**, computer generated signature will **not** be accepted.



4. NEW INSTALLER SIGN-UP AND APPROVAL PROCEDURE



4. New Installer Sign-Up Form

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

Installer Registration

Company Information

Organization Name Federal Tax ID Email Address Work Phone

Address City State

Zip Code Fax

Contact Information

First Name Last Name Email Address Desired User ID

Phone Number Extension Mobile Number

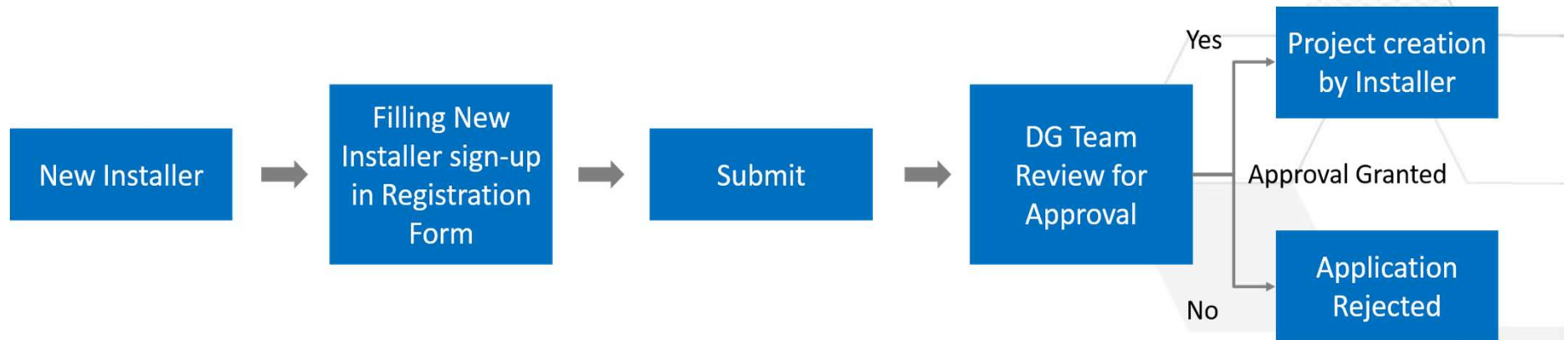
Project Participation Interest

Small System Large System

[Help / Training Guide](#) | [FAQs](#)

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

4.1 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

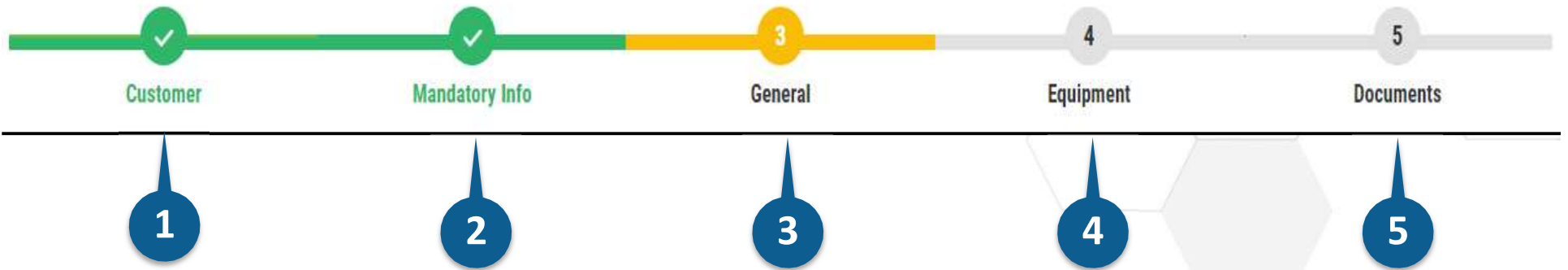
Step 4: Until the Installer is approved by the DG team, projects cannot be created by the Installer; however, the Installer can view the Dashboard and other items



5. INTRODUCTION TO TABS IN THE PORTAL



5. Introduction to Tabs in the Portal



Five Tabs for creating project:

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



6. PROJECT CREATION

6.1 Customer Tab

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Close Save

Code: Premise No: 9999999 Connected Capacity (kW): DC Capacity (kW): Workflow Status: Status Date:

1 2 3 4 5
Customer Info General Equipment Documents

Code * Project Name * Installer * Requested Energization Date
Synaptic Solar Select

Customer Information

Click on icon to search and include the customer in the project

Premise No (Last 7 digits of ESID) Customer Name Service Address Additional Name
9999999 John Doe 123 MAIN STREET, DALLAS, TX - 75039

* Phone Number * Email Address
(879) 888-9989 anbsystems.com

Mailing Address

* Same as service point address Yes No
Address City State Zip Code
123 MAIN STREET DALLAS TX 75039

Meter & Load Profile Status

Meter Status Load Profile Updated
NO

Continue

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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**

6.1.1 Customer Tab – Add Premise

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Select Customer

Code: Prem

Premise No *

9999999

Go

	Premise No	Customer Name	Address	City	State	ZIP Code	Meter Number
<input type="radio"/>	9999999	John Doe	123 MAIN STREET	DALLAS	TX	75039	ESLG

Total 1 10/page < 1 > Go to 1

Cancel Add

Premise No (Last 7 digits of ESIID) Customer Name Service Address Additional Name

* Phone Number * Email Address

1. Enter the correct 7-digit premise number (last 7 digits of ESI ID)
2. Click on **Go**
3. Select the correct premise record from the listed customer record
4. Click on **Add**

6.2 Mandatory Info Tab

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT [Comments] [History] [Close] [Save] Generate TA [Submit]

Code: DRG-30338 Premise No: 9999999 Connected Capacity (kW): DC Capacity (kW): Workflow Status: Created Status Date: 05/15/2020 08:21 AM

Customer Mandatory Info General Equipment Documents

* Type of Entity (Ownership)
Account holder is system owner

Owner of the Renewable System

Legal Name (System Owner/Customer) System Owner Email DBA (If Applicable) System owner entity type
John Doe rajasekar@anbystems.com Individual

End-Use Customer Information

End use customer name End use customer Email End use customer entity type
John Doe rajasekar@anbystems.com Individual

Premise Owner Information

Property owner is same as end-use customer Yes
Premise Owner Name Premise owner Email Relationship between customer & owner
John Doe rajasekar@anbystems.com Owner

* Premise Owner Entity Type
Individual

Authorized to Release Information

* Project Manager Name * Project Manager Email * Project Manager Phone
Electrical Contractor Name Electrical Contractor Email Electrical Contractor Phone
Consultant Name Consultant Email Consultant Phone

Authorized to Release Information - Other

Other Name Other Email Other Phone

Back Continue

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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**

6.3 General Tab

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT [Comments] [History] [Close] [Save] Generate TA [Submit]

Code: DRG-30338 Premise No: 9999999 Connected Capacity (kW): DC Capacity (kW): Workflow Status: Created Status Date: 05/15/2020 08:21 AM

Customer Mandatory Info **General** Equipment Documents

* Number of Phases: 1 Phase
* Frequency: 60 Hz
* Normal Operation of Interconnection: Export excess to grid
* Do you plan to export power?: No

Export (Total Inverter) Capacity (kW):
Is DG co-located with load?: Yes

Delivery Voltage & Interconnection Point Information

* Delivery Voltage Information: 120/208, 3 Phase, 4 Wire
* Interconnection Point: Customer Meter Base

Meter Accessibility Questionnaire

* Is your meter accessible?: Yes
* Is your meter behind a locked gate?: No
* Are there unsecured dogs on the property?: No

[Back] [Continue]

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1. Fill in the fields No of Phases, Normal Operation of Interconnection
2. If **Plan 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**

6.4. Equipment Tab (1/6)

Customer Mandatory Info General Equipment Documents

1

Inverter Energy Storage System Wind Turbine with Inbuilt Inverter Synchronous Induction Fuel Cell

Instructions: Please click the 'Add New' button to add the inverter details. Solar / Fuel Cell / Battery / Wind Turbine equipment can be added after adding inverter equipment. If you wanted to add Battery or Wind Turbine which has integrated or inbuilt inverter, please add under respective equipment section.

2

Add New

Back Continue

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1. Select the type of equipment/s
2. Click on **Add New**

6.4.1 Equipment Tab (2/6) – Inverter

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ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT [Comments] [History] [Close] [Save] Generate TA [Submit] [Add New]

Inverter#1 Inverter Capacity (kW): DC Capacity (kW): [trash] [dropdown]

Instructions:

- Please click the 'search icon' and click the 'Go' button to select the inverter manufacturer & model and click 'Add'.
- Enter the 'Number of inverters' & 'Power Factor' and click 'Save'.
- Lists are provided from Go Solar California <https://www.gosolarcalifornia.ca.gov/equipment/inverters.php>
- After adding inverter, you will find option to add any DG equipment connected to inverter (Solar / Wind Turbine)

Manufacturer - Model Number [1] [search icon] Number of Inverters * [2] Power Rating (watts) [2]

Description [3] Weighted Efficiency (%) [4] Nominal Voltage [5]

Power Factor * [6] Inverter Capacity (kW)

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

6.4.2 Adding Equipments in Equipment Tab (3/6) - Inverter

WELCOME RAJASEKAR LN. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT **Select Inverter**

Manufacturer: ABB Model Number: []

Go

	Manufacturer	Model Number	Description	Watts	Power Rating(kW)
<input checked="" type="radio"/>	ABB	UNO-2.0-TL-OUTD-S-US [277V]	2.0 kW, 277 Vac Utility Interactive Inverter	2,000	2
<input type="radio"/>	ABB	UNO-2.0-I-OUTD-S-US [240V]	2 kW, 240 Vac Utility Interactive Inverter. Model nu...	2,000	2
<input type="radio"/>	ABB	UNO-2.0-TL-OUTD-S-US-Z-A [277V]	2.0 kW, 277 Vac Utility Interactive Inverter with arc...	2,000	2
<input type="radio"/>	ABB	PVI-S-US-Z-A [277V]	3 kW, 277 Vac Utility Interactive Inverter with arc d...	3,000	3

Total 388 10/page < 1 2 3 4 5 6 ... 39 > Go to 1

Cancel Add

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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

6.4.3 Equipment Tab (4/6)

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Comments History Close Save Generate TA Submit

Manufacturer - Model Number ABB - PVI-3.0-OUTD-S-US-A [277V] Number of Inverters * 12 Power Rating (watts) 3000

Description 3 kW, 277 Vac Grid Support Utility Interactive Inverter with arc detector Weighted Efficiency (%) 96 Nominal Voltage 277

Power Factor * 0.99 Inverter Capacity (kW) 36.00

DG Equipment Solar + Add Save

Solar
Battery
Wind Turbine

Back Continue

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1. Choose the equipment from the DG Equipment drop-down and then Click **Add**
2. Standalone batteries are added under Inverter tab and the Battery with Inbuilt Inverter/ ESS batteries are added in the Energy Storage System tab.



6.4.4 Equipment Tab (5/6)

Add / Edit Solar Panels

Instructions:

- Please click the 'search icon' and click the 'Go' button to select the solar manufacturer & model. Select the respective model and click 'Add'.
- Enter the 'Number of Panels', 'Shading', 'Tilt', 'Azimuth', & select 'Array Type' and click 'Save'.
- Lists are provided from Go Solar California https://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php

Manufacturer - Model Number	Number of Panels *	Power Rating (Watts)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Description	Array Type *	Module Type *	
<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	
Azimuth (0 to 270) (in degrees) *	Tilt (0 to 90) (degrees) *	Shading (%) *	System Loss (%)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Calculate

Solar Panel Capacity (kW)	Annual Energy (kWh)
<input type="text"/>	<input type="text"/>

For Solar PV, once the correct **Manufacturer – Model Number (1)** is selected, related fields including the **Power Rating (2)**, **Description (3)** will be auto populated

6.4.5 Equipment Tab (6/6)



Add / Edit Solar Panels

Instructions:

- Please click the
- Enter the 'Number
- Lists are provide

Manufacturer - Model

Description

Azimuth (0 to 270) (i

Calculate

Solar Panel Capacity

Select Solar Panels

Manufacturer Model Number

Go

	Manufacturer	Model Number	Description	Power Rating(watts)	PTC
<input type="radio"/>	Tesla Inc.	SR24S3-2	23.75W Polycrystalline Smooth Solar Roof Module	23.75	20.5
<input type="radio"/>	Tesla Inc.	SR24T3-2	23.75W Polycrystalline Textured Solar Roof Module	23.75	20.5
<input type="radio"/>	Tesla Inc.	SR25S3	25W Smooth Solar Roof Module	25	22.3
<input type="radio"/>	Tesla Inc.	SR25T3	25 W Textured Solar Roof Module	25	21.9
<input type="radio"/>	Tesla Inc.	SR60T1	58.47 W, 42 cell polycrystalline Solar Roof module, 600...	58.47	52.1

Total 5 10/page < **1** > Go to

Cancel **Add**

Cancel **Save**

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

6.5 Documents Tab

The screenshot shows the Oncor Distributed Generation Interconnection Portal interface. At the top, there is a navigation bar with 'ONCOR' logo, 'DISTRIBUTED GENERATION INTERCONNECTION PORTAL', and menu items: 'DASHBOARD', 'PRESCREENING', 'PROJECTS', and 'TRAINING GUIDES'. Below the navigation bar, there is a 'PROJECT' section with a lock icon and a toolbar containing 'Comments', 'History', 'Close', 'Save', 'Select Workflow State', and 'Submit'. A progress bar shows five steps: 'Customer', 'Mandatory Info', 'General', 'Equipment', and 'Documents'. The 'Documents' step is highlighted in yellow and has a document icon. Below the progress bar, there is a 'Note' section with a list of requirements for the One Line Diagram and Layout Sketch. The 'Documents' section contains three upload cards: 'Layout Sketch' (file: Tri-County Site Plan.pdf, uploaded 10/06/2022 11:00 AM), 'One Line Diagram' (file: SLD (1) (1).pdf, uploaded 10/06/2022 10:56 AM), and 'Placards' (file: Placards.pdf, uploaded 10/06/2022 10:57 AM). Each card has an 'Upload Completed' status and a 'No' override option. Blue callout boxes with numbers 1 through 5 point to the progress bar, the note, the Layout Sketch card, the One Line Diagram card, and the Placards card respectively.

1. Note: Information about all the Oncor's project requirements
2. Upload **Layout Sketch**
3. Upload **One Line Diagram**
4. Upload **Placard proof**
5. The **Override option** – During incorrect ESI ID and address validation error message, please use override option to proceed

6.5.1 Documents Tab - Preview

The screenshot displays the ONCOR Distributed Generation Interconnection Portal. At the top, it says "WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER". The main navigation includes "DASHBOARD", "PRESCREENING", "PROJECTS" (which is active), and "TRAINING GUIDES". Below this, there's a "PROJECT" section with buttons for "Comments", "Documents", "History", "Close", "Save", "Generate TA", and "Submit".

The project details are: Code: DRG-30342, Premise No: 9999999, Connected Capacity (kW): 36.00, DC Capacity (kW): 0.29, Workflow Status: Created, Status Date: 05/18/2020 05:07 AM.

A progress bar shows five steps: Customer, Mandatory Info, General, Equipment, and Documents. The first four steps are completed (green with checkmarks), and the Documents step is in progress (yellow with a circle containing '1').

A "Note" section contains the following instructions:

- VLLD, Oncor meter, and generation equipment should be clearly labelled and identified in One line diagram
- Distance between VLLD & Oncor meter should be clearly marked in the diagram (Preferably within 10 feet)
- Sketches should have Service address and placard proofs of the equipments
- Layout sketch should have text "Visible Lockable Labeled Disconnect" written on it

Below the note, there are two document upload entries. The first is "Layout Sketch" with file name "LAYOUT resubmit.pdf", uploaded on 05/18/2020 05:56 AM. It has a blue circle with '1' pointing to the file name. The second is "Line Diagram" with file name "ONE LINE resubmit.pdf", also uploaded on 05/18/2020 05:56 AM. It has a blue circle with '2' pointing to the upload status and a blue circle with '3' pointing to the file name.

At the bottom, there's a "Supporting Documents" section with a "Drop file here or click to upload" area and a note: "Max allowed size for each document is 200 MB". There are "Back" and "Submit" buttons at the bottom right.

1. Document Preview: Clicking on the uploaded document file will display the preview of that file
2. Info Icon: Provides the uploaded document information-type and name of the document
3. Document validation result icon

6.6 Workflow Movement

The screenshot displays the ONCOR Distributed Generation Interconnection Portal. At the top, it says "WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER". The main navigation bar includes "DASHBOARD", "PRESCREENING", "PROJECTS", and "TRAINING GUIDES". The "PROJECTS" tab is active, showing a "PROJECT" view with buttons for "Comments", "History", "Close", "Save", "Generate TA", and "Submit". A dropdown menu is open over the "Generate TA" button, with a blue callout "1" pointing to it. Below this, project details are shown: "Code: DRG-30338", "Premise No: 9999999", "Connected Capacity (kW): 36.00", "DC Capacity (kW): 0.55", "Workflow Status: Created", and "Status Date: 05/15/2020 08". A "Generate TA" button is also visible. A modal window titled "Add Workflow Comment" is open, with a yellow callout "5" pointing to its top right corner. The modal contains a rich text editor with a toolbar and a "Note:" section with a bulleted list: "VLLD, Oncor me", "Distance between", "Sketches should", and "Layout sketch sh". A blue callout "2" points to the "Save" button in the modal. Below the modal, there are sections for "Layout Sketch" and "One Line Diagram", each with an "Upload Completed" status and a file name "LAYOUT resubmit.pdf" and "ONE LINE resubmit.pdf" respectively, along with their upload dates. At the bottom, there is a "Supporting Documents" section and a footer with the TRACK logo, copyright notice "© 2020 ONCOR ELECTRIC DELIVERY COMPANY LLC. ALL RIGHTS RESERVED.", and social media icons.

1. Change the workflow from the drop-down and Click on **Submit**
2. Add any workflow comments in the pop-up window, if any; and click on **Save**

6.6 Workflow Movement

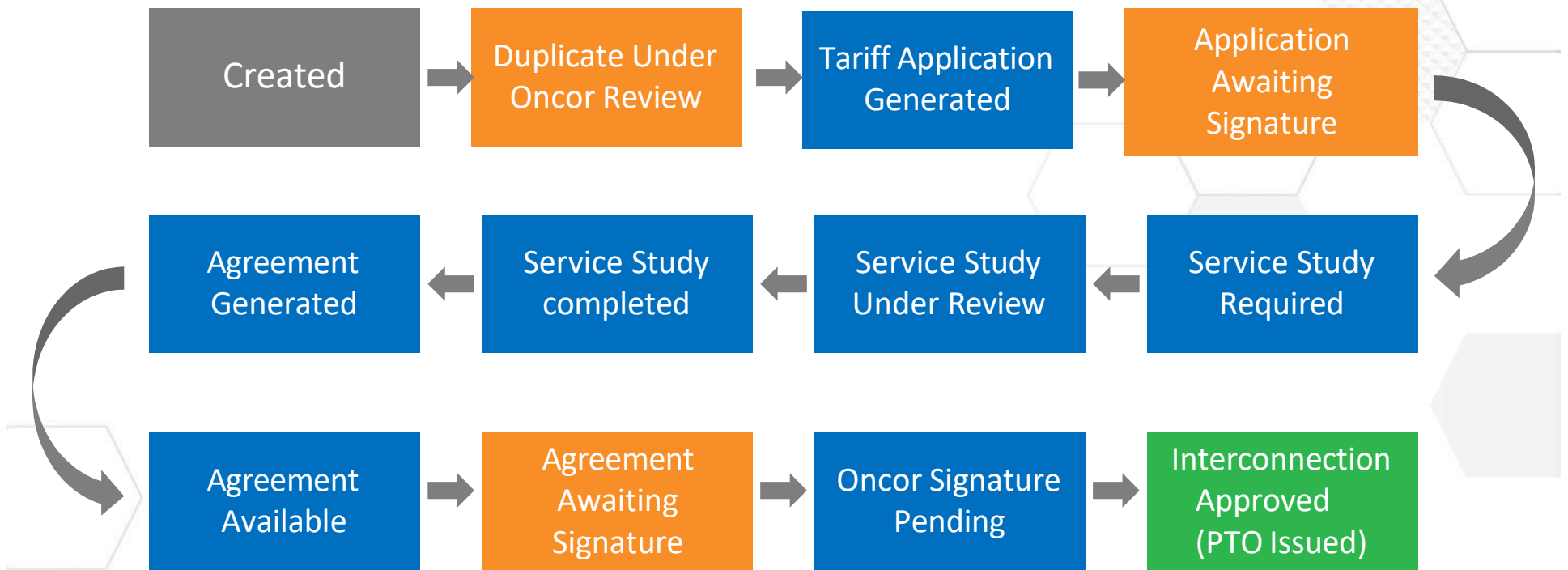
The screenshot displays the ONCOR Distributed Generation Interconnection Portal interface. At the top, it says "WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER". The main navigation bar includes "DASHBOARD", "PRESCREENING", "PROJECTS", and "TRAINING GUIDES". The "PROJECTS" tab is active, showing a "PROJECT" view with buttons for "Comments", "History", "Close", "Save", "Generate TA", and "Submit". A dropdown menu is open over the "Generate TA" button, with a blue callout "1" pointing to it. Below this, project details are shown: "Code: DRG-30338", "Premise No: 9999999", "Connected Capacity (kW): 36.00", "DC Capacity (kW): 0.55", "Workflow Status: Created", and "Status Date: 05/15/2020 08". A "Generate TA" button is also visible. A modal window titled "Add Workflow Comment" is open, with a yellow callout "5" pointing to its top right corner. The modal contains a rich text editor with a toolbar and a "Note:" section with a bulleted list: "VLLD, Oncor me", "Distance between", "Sketches should", and "Layout sketch sh". A blue callout "2" points to the "Save" button in the modal. Below the modal, there are sections for "Layout Sketch" and "One Line Diagram", each with an "Upload Completed" status and a file name "LAYOUT resubmit.pdf" and "ONE LINE resubmit.pdf" respectively, along with their upload dates. The footer includes the TRACK logo, copyright information "© 2020 ONCOR ELECTRIC DELIVERY COMPANY LLC. ALL RIGHTS RESERVED.", and social media icons for Twitter, Facebook, YouTube, LinkedIn, and GitHub.

1. Change the workflow from the drop-down and Click on **Submit**
2. Add any workflow comments in the pop-up window, if any; and click on **Save**



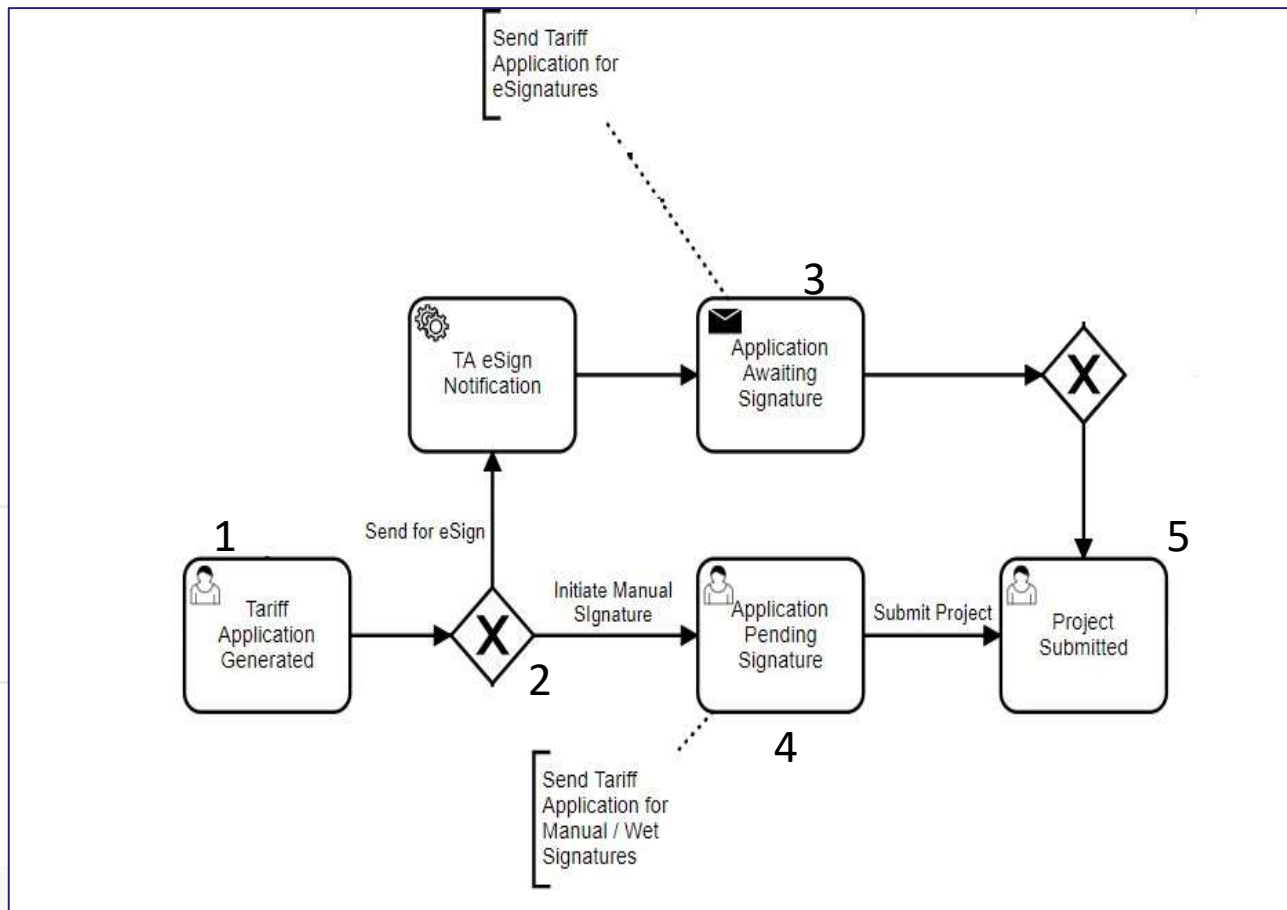
7. HIGH LEVEL CHANGES

7. Workflow



- Duplicate Under Oncor Review 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

7.1 Tariff Application Section



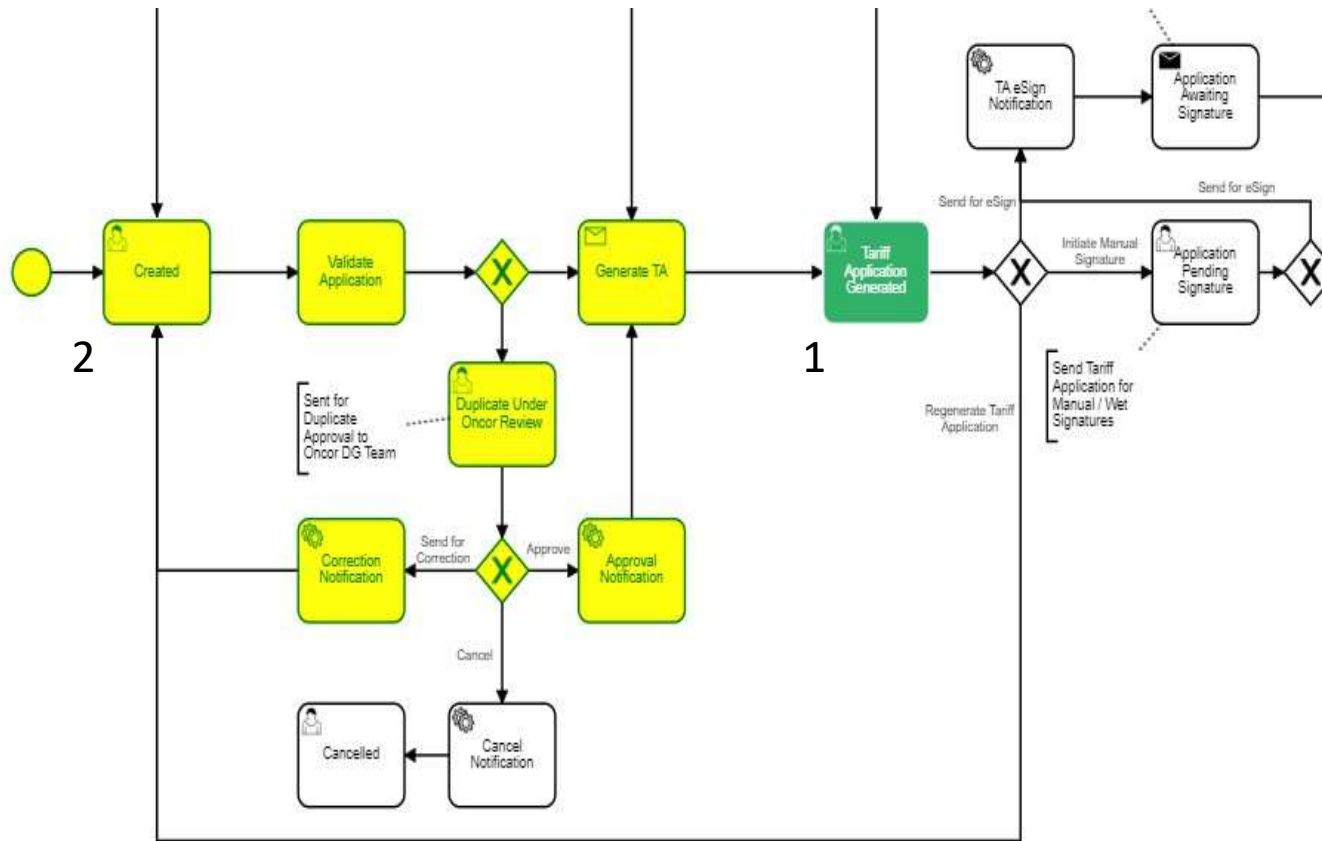
Step 1: Tariff application has been generated

Step 2: Installer has the option to choose either eSignature or Initiate manual signature

Step 3: Application Awaiting Signature status – Waiting on the customer to eSign the document, the project moves to Step 5 once customer sign it

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

7.1.1 Tariff Application Section Contd.



To make any changes to the application at Tariff Application generated status, please follow:

Step 1: Click workflow drop down at 'Tariff application generated status'

Step 2: Installer has the option to set the project back to 'Created' status by selecting **Regenerate tariff application** from the workflow drop down menu

7.2 Agreement Available status

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Comments eSignature History Close Save Select Workflow State Submit

Code: DRG- Premise No: Connected AC Capacity (kW): 12.47 DC Capacity (kW): 17.00 Project Name: Workflow Status: Agreement Available Status E

Name: Fuel: Solar

Customer Mandatory Info General Equipment

Note :

- Submit Hardcopy Agreement
- Send for eSign
- Changes Required**
- Regenerate Agreement

To make changes to the application at 'Agreement Available' status:

Step 1: Click the workflow drop down at Agreement available status to view different options

Step 2: Installer has the option to set the project back to 'Created' status by selecting **Changes Required** from the workflow drop down (as shown above)

7.3 Duplicate Check

The screenshot shows the ONCOR Distributed Generation Interconnection Portal. The top navigation bar includes 'DASHBOARD', 'PRESCREENING', 'PROJECTS', and 'TRAINING GUIDES'. The 'PROJECTS' tab is active. Below the navigation, there are buttons for 'Comments', 'History', and 'Close'. The main content area displays project details: Code: DRG-Name, Premise No.: Fuel: Solar, Connected AC Capacity (kW): 8.25, DC Capacity (kW): 11.40, Project Name: [redacted], Workflow Status: Duplicate Under Oncor Review (highlighted with a red box), and Status Date: 10/23/2022 11:48 AM. A yellow warning banner states: 'Project is identified as a "Duplicate" i.e, the customer / premise number has another project in DG Portal.' Below this, a note explains that this means another project currently exists for this customer/premise. Further instructions include providing a Customer Authorization statement, remembering to input all system equipment details, and not sending customer authorization documents to dg@oncor.com. A progress bar at the bottom shows five steps: Customer, Mandatory Info, General, Equipment, and Documents. The first four steps are completed (green checkmarks), and the fifth step, Documents, is currently active (yellow circle with a document icon). A note at the bottom provides additional instructions regarding VLLD, Oncor meter, and generation equipment labeling.

Duplicate project- Duplicate Under Oncor Review status means there is a duplicate project, and it is waiting on Oncor’s team to review and approve it

7.3.1 Duplicate Types

Duplicate Project Details

Duplicate Reason

Possible project from another installer ^

Adding equipment to an existing system

Other

Possible project from another installer

Replacing existing system

Transfer of Customer Ownership of existing Interconnection Agreement

Duplicate Project Details

Duplicate Reason

Adding equipment to an existing system v

Back continue

- Adding equipment to an existing system- Existing and New equipments should be added in the Equipment tab, Layout as well as the One-line diagram
- Possible project from another installer- Customer authorization letter should be uploaded in documents tab
- Other- Provide additional details in 'Duplicate reason' section and upload customer authorization letter in the Documents tab

If the project is identified as a duplicate, the Installer will need to provide the duplicate reason to proceed with the project

7.3.2 Duplicate Approval

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT [Comments] [History] [Close] [Save] [Select Workflow State] [Submit]

Code: DRG-30343 Premise No: 9999999 Connected Capacity (kW): 36.00 DC Capacity (kW): 2.76 **Workflow Status: Tariff Application Generated** Status Date: 05/18/2020 01:32 PM

Customer Mandatory Info General Equipment Documents

Note :

- VLLD, Oncor meter, and generation equipment should be clearly labelled and identified in One line diagram
- Distance between VLLD & Oncor meter should be clearly marked in the diagram (Preferably within 10 feet)
- Sketches should have Service address and placard proofs of the equipments
- Layout sketch should have text "Visible Lockable Labeled Disconnect" written on it

Layout Sketch Upload Completed [File Name] lay out_JENA_PRINCE_1_.pdf Uploaded On 05/18/2020 01:26 PM

One Line Diagram Upload Completed [File Name] Gardea LD (1).pdf Uploaded On 05/18/2020 01:26 PM

Tariff Application Upload Completed [File Name] Tariff Application.pdf Uploaded On 05/18/2020 01:32 PM

Interconnection Agreement

Duplicate Approval- Once Oncor’s review team approves the duplicate, the project will move to ‘Tariff Application Generated’ status. Please use the workflow drop-down to proceed with the project

7.4 eSignature Tab

The screenshot shows the ONCOR Distributed Generation Interconnection Portal. The top navigation bar includes 'DASHBOARD', 'PRESCREENING', 'PROJECTS', and 'TRAINING GUIDES'. The 'PROJECTS' tab is active. Below the navigation bar, there are buttons for 'Comments', 'Documents', 'eSignature' (highlighted with a red box), 'History', 'Close', 'Save', and 'Submit'. A dropdown menu for 'Select Workflow State' is also present. The main content area displays project details: Code: DRG-30342, Premise No: 9999999, Connected Capacity (kW): 36.00, DC Capacity (kW): 0.29, Workflow Status: Tariff Application Generated, and Status Date: 05/18/2020 12:02 PM. A progress bar shows five steps: Customer (checked), Mandatory Info (checked), General (checked), Equipment (active), and Documents. Below the progress bar, there are tabs for 'Inverter', 'Battery with Inbuilt Inverter', 'Wind Turbine with Inbuilt Inverter', 'Synchronous', and 'Induction'. The 'Inverter' tab is selected. Instructions for adding inverters are provided, along with an 'Add New' button. A table shows one inverter entry with details like 'Inverter Capacity (kW): 36.00' and 'DC Capacity (kW): 0.29'.

Click on the eSignature tab to see the eSignature status for both the Tariff application and Interconnection agreement

7.4.1 eSignature Tab

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

eSignatures

← Back Refresh

Tariff Application
Document Id: 4a528f29-666e-410b-9186-fe91be36e65b | Status: Pending | Sent: 05/18/2020 11:43 AM | Expiry: 06/17/2020 11:43 AM | Completed:

Parties				Document Audits	
Name	Sent	Viewed	Signed	TimeStamp	Message
rajasekar@anbsystems.com rajasekar@anbsystems.com	✓			05/18/2020 11:43 AM	rajasekar@anbsystems.com (rajasekar@anbsystems.com) was emailed a link to sign.

1. Void Document – Installer can void the document and set the project’s status back to either of ‘Agreement available/Tariff Application Generated’ status; this is useful to resend documents for eSignature or initiate manual signature
2. Please use bell icon to send **Reminder** emails to the customer to e-sign the documents

7.4.2 eSignature Tab – how Void Option works

ONCOR DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

eSignatures ← Back Refresh **1**

Tariff Application
Document Id: 4a528f29-666e-410b-9186-fe91be36e65b | Status: Pending | Sent: 05/18/2020 11:43 AM | Expiry: 06/17/2020 11:43 AM | Completed:

Parties

Name	Sent	Viewed	Signed
rajasekar@anbsystems.com rajasekar@anbsystems.com	✓		

Document Audits

TimeStamp	Message
05/18/2020 11:43 AM	rajasekar@anbsystems.com (rajasekar@anbsystems.com) was emailed a link to sign.

- Once the void button is selected, it will void the document and the project will be pushed back to its previous status
- Since the document has been signed yet, the Installer can either proceed to either re-send the document for e-signature or opt to initiate the hardcopy signature process

7.4.3 eSignature Tab – Void Option Contd.

The screenshot displays the 'eSignatures' interface for an 'Interconnection Agreement'. The document ID is 89642ee8-3c1f-4ff9-afde-3bd9d8fc9d08, with a status of 'Pending', sent on 05/20/2020 at 11:36 AM, and an expiry date of 08/18/2020 at 11:36 AM. The 'Parties' table lists two entries for 'abhilash@anbsystems.com', both with a 'Sent' status and a checkmark. The 'Document Audits' table shows a single entry with a timestamp of 05/20/2020 at 11:36 AM and a message: 'abhilash@anbsystems.com (abhilash@anbsystems.com) was emailed a link to sign.' A modal dialog box titled 'Void document' is overlaid on the interface, asking 'Are you sure you want to void this document?' with 'Cancel' and 'Ok' buttons.

Name	Sent	Viewed	Signed
abhilash@anbsystems.com abhilash@anbsystems.com	✓		
abhilash@anbsystems.com abhilash@anbsystems.com	✓		

TimeStamp	Message
05/20/2020 11:36 AM	abhilash@anbsystems.com (abhilash@anbsystems.com) was emailed a link to sign.

1. Click **Ok**
2. The project status will be reverted to its previous Status:
 - For Tariff application – the final status would be 'Tariff application Generated'
 - For Interconnection Agreement – it would be 'Agreement Available'



8. EQUIPMENT LIST – INVERTERS & SOLAR PV

8.1 Equipment List - Inverter

WELCOME TEST INSTALLER. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT Generate TA

Inverter#1 Inverter Capacity (kW): DC Capacity (kW):

Instructions:

- Please click the 'search icon' and click the 'Go' button to select the inverter manufacturer & model and click 'Add'.
- Enter the 'Number of inverters' & 'Power Factor' and click 'Save'.
- Lists are provided from Go Solar California <https://www.gosolarcalifornia.ca.gov/equipment/inverters.php>
- After adding inverter, you will find option to add any DG equipment connected to inverter (Solar / Battery / Wind Turbine)

Manufacturer - Model Number Number of Inverters * Power Rating (watts)

Description Weighted Efficiency (%) Nominal Voltage

Power Factor * Inverter Capacity (kW)

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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. Click **Save (6)** to save the Inverter details.

8.1.1 Equipment List - Inverter

WELCOME RAJASEKAR LN. YOU ARE LOGGED IN AS INSTALLER

ONCOR. DISTRIBUTED GENERATION INTERCONNECTION PORTAL

DASHBOARD PRESCREENING **PROJECTS** TRAINING GUIDES

PROJECT **Select Inverter**

Manufacturer: ABB Model Number: [] Go

	Manufacturer	Model Number	Description	Watts	Power Rating(kW)
<input type="radio"/>	ABB	UNO-2.0-TL-OUTD-S-US [277V]	2.0 kW, 277 Vac Utility Interactive Inverter	2,000	2
<input type="radio"/>	ABB	UNO-2.0-I-OUTD-S-US [240V]	2 kW, 240 Vac Utility Interactive Inverter. Model nu...	2,000	2
<input type="radio"/>	ABB	UNO-2.0-TL-OUTD-S-US-Z-A [277V]	2.0 kW, 277 Vac Utility Interactive Inverter with arc...	2,000	2
<input type="radio"/>	ABB	PVI-S-US-Z-A [277V]	3 kW, 277 Vac Utility Interactive Inverter with arc d...	3,000	3

Total 388 10/page < 1 2 3 4 5 6 ... 39 > Go to 1

Cancel Add

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

8.2 Equipment List - Solar PV

Add / Edit Solar Panels

Instructions:

- Please click the 'search icon' and click the 'Go' button to select the solar manufacturer & model. Select the respective model and click 'Add'.
- Enter the 'Number of Panels', 'Shading', 'Tilt', 'Azimuth', & select 'Array Type' and click 'Save'.
- Lists are provided from Go Solar California https://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php

Manufacturer - Model Number **1**

Number of Panels * **2**

Power Rating (Watts)

Description **3**

Array Type *

Module Type *

Azimuth (0 to 270) (in degrees) *

Tilt (0 to 90) (degrees) *

Shading (%) *

System Loss (%)

Calculate

Solar Panel Capacity (kW)

Annual Energy (kWh)

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

8.2.1 Equipment List – Solar PV

Add / Edit Solar Panels

Instructions:

- Please click the
- Enter the **Number**
- Lists are provide

Manufacturer - Model

Description

Azimuth (0 to 270) (i

Calculate

Solar Panel Capacity

Select Solar Panels ⓧ

Manufacturer Model Number

Go

	Manufacturer	Model Number	Description	Power Rating(watts)	PTC
<input type="radio"/>	Tesla Inc.	SR24S3-2	23.75W Polycrystalline Smooth Solar Roof Module	23.75	20.5
<input type="radio"/>	Tesla Inc.	SR24T3-2	23.75W Polycrystalline Textured Solar Roof Module	23.75	20.5
<input type="radio"/>	Tesla Inc.	SR25S3	25W Smooth Solar Roof Module	25	22.3
<input type="radio"/>	Tesla Inc.	SR25T3	25 W Textured Solar Roof Module	25	21.9
<input type="radio"/>	Tesla Inc.	SR60T1	58.47 W, 42 cell polycrystalline Solar Roof module, 600...	58.47	52.1

Total 5 < **1** > Go to

Cancel **Add**

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



THANK YOU!

