Oncor Distribution Generation Installer Portal Training Guide

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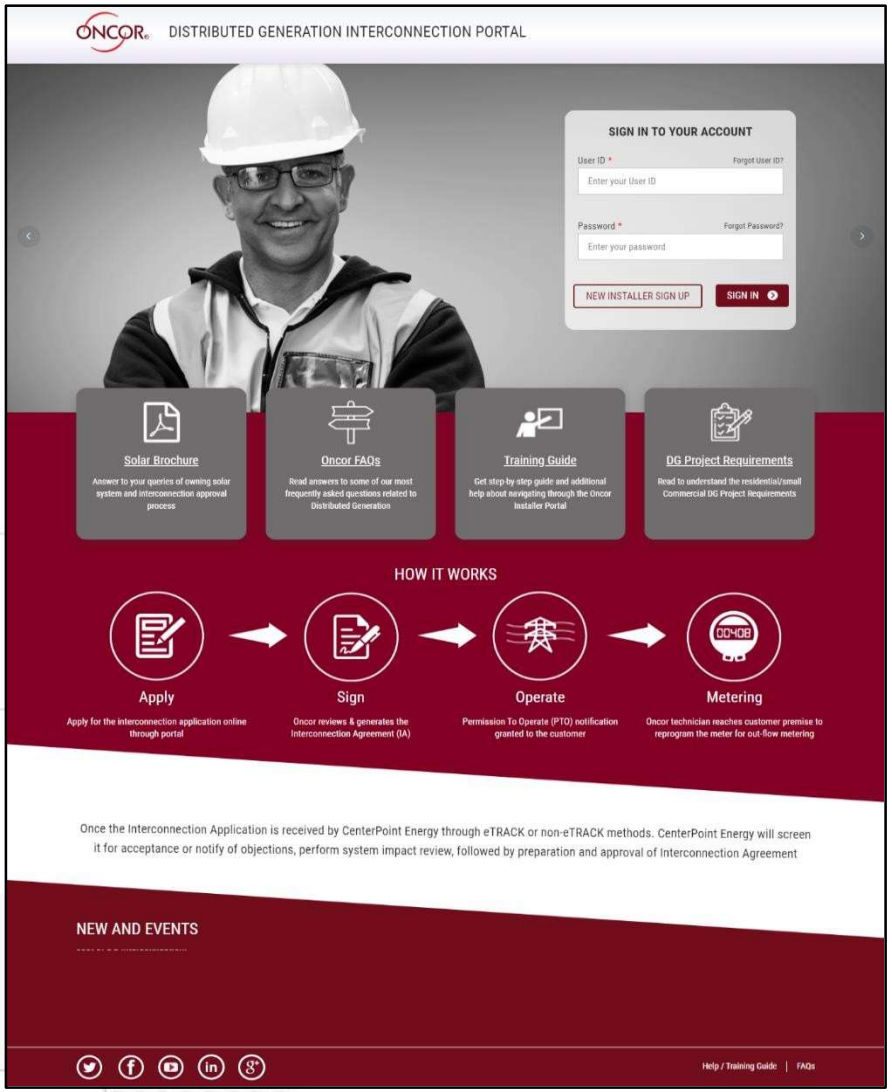
1. Introduction to Oncor DG Portal



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

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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

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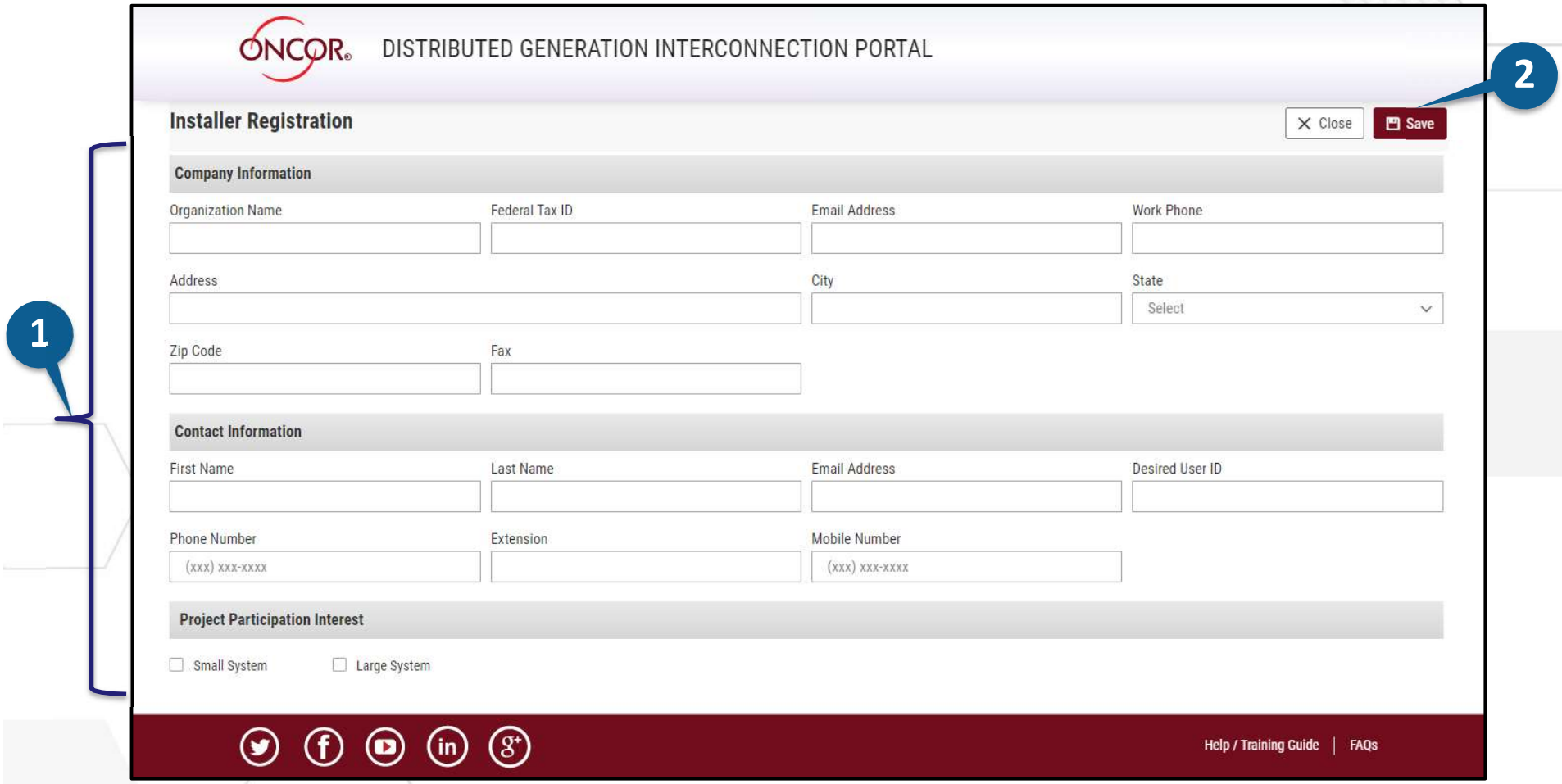
2.1 Registration Page



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

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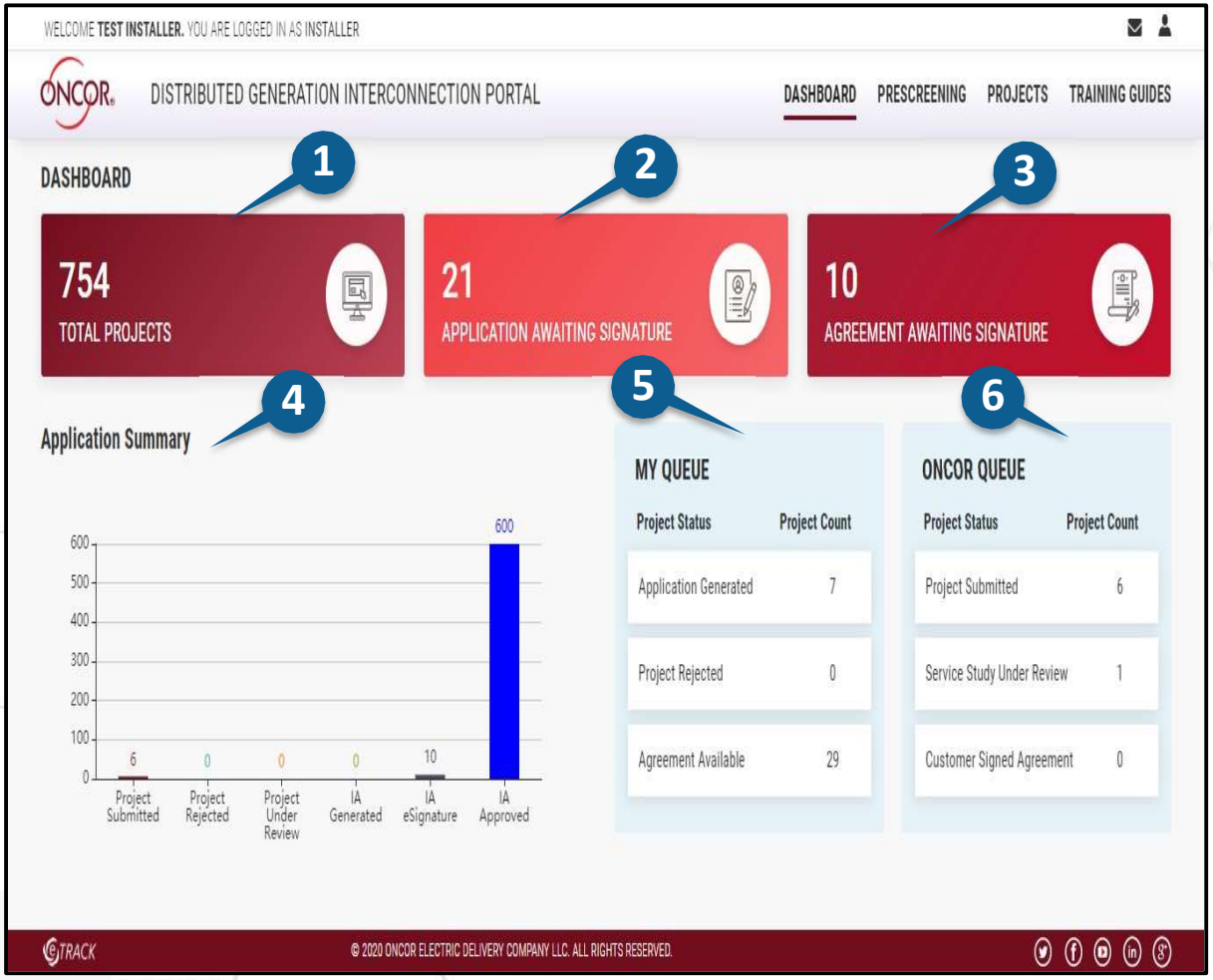
2.2 Dashboard



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

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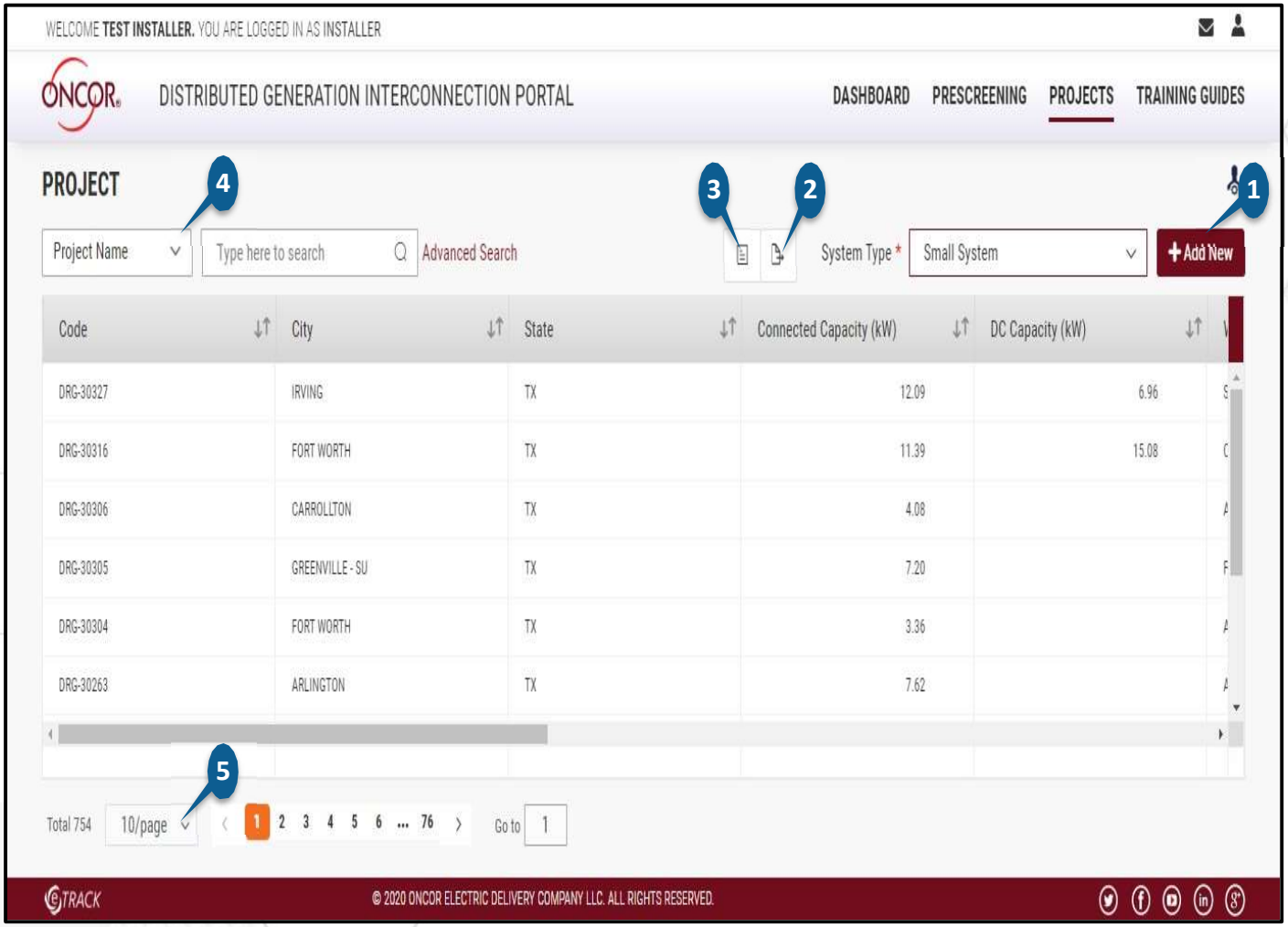
2.3 Project List Page



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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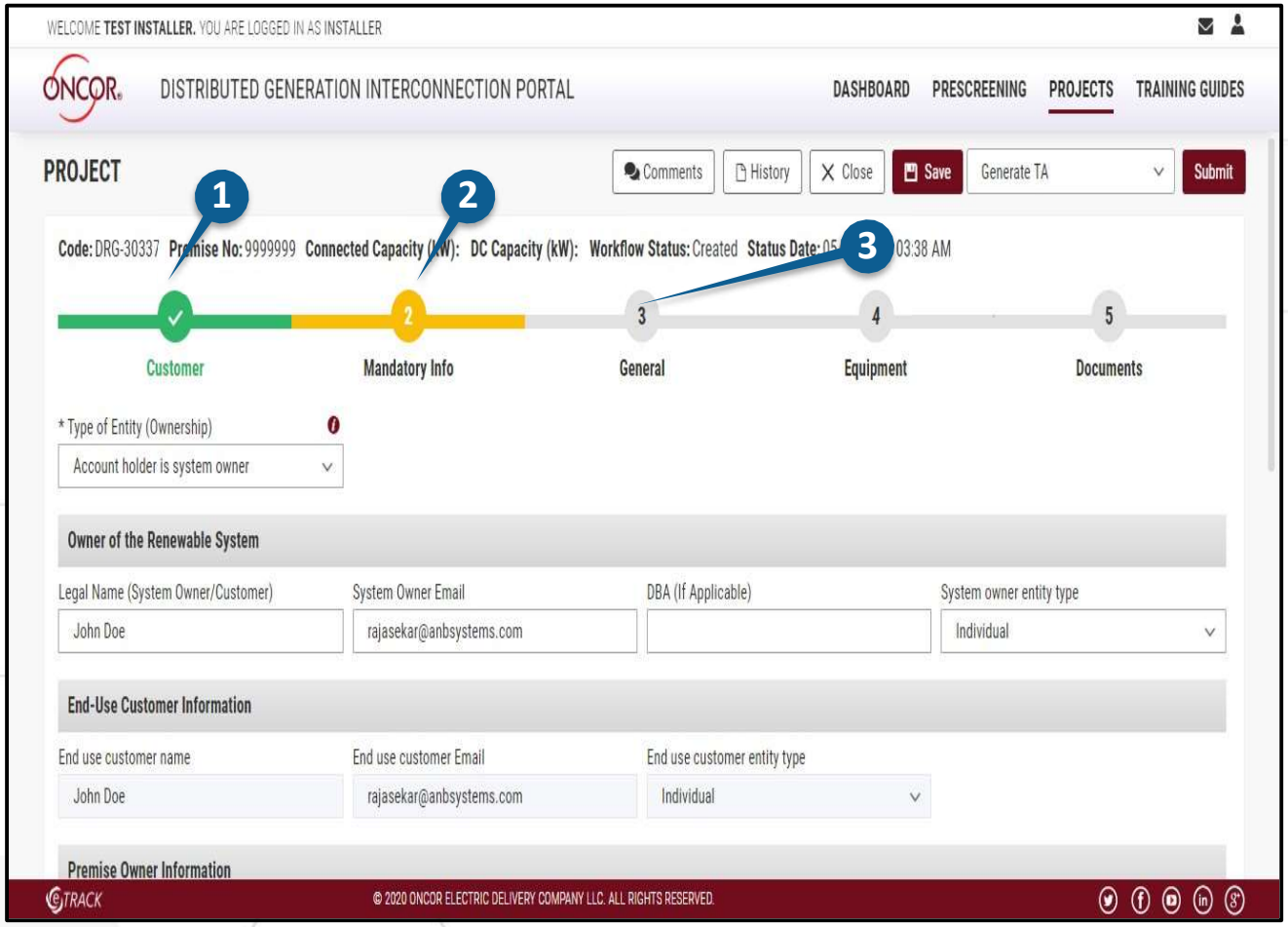
2.4 Project Tabs Navigation



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

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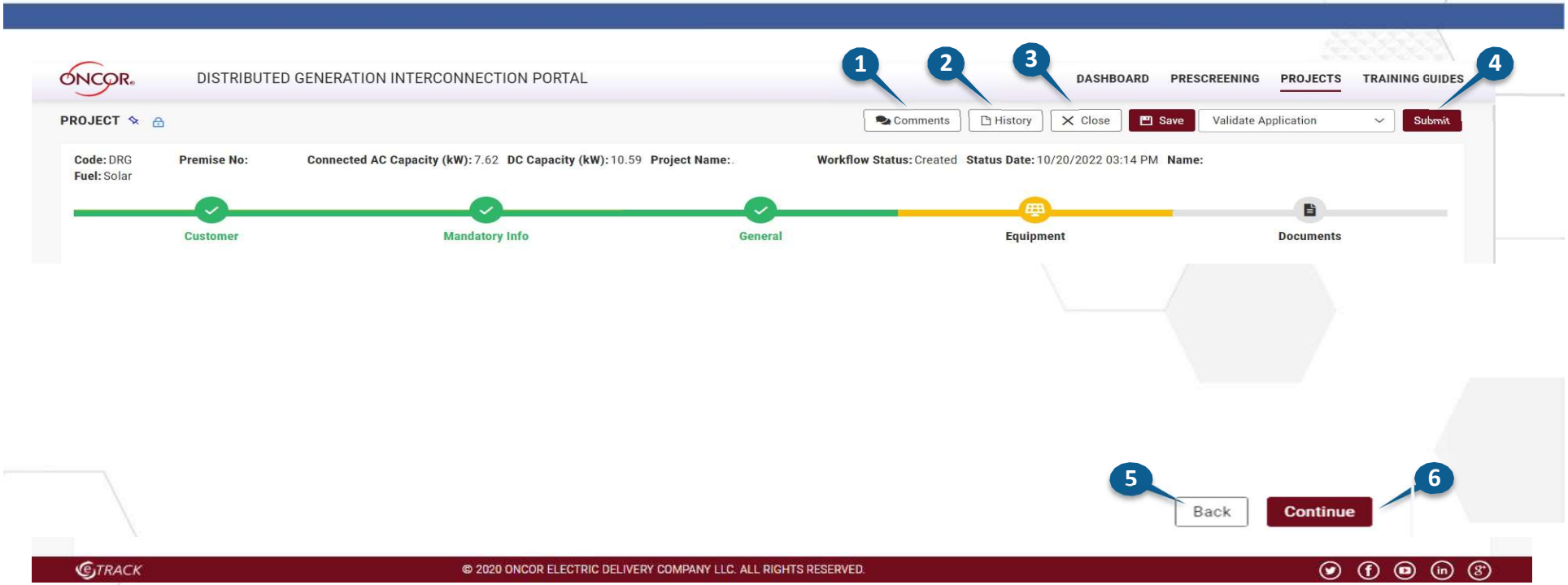
2.5 Tool Bar



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

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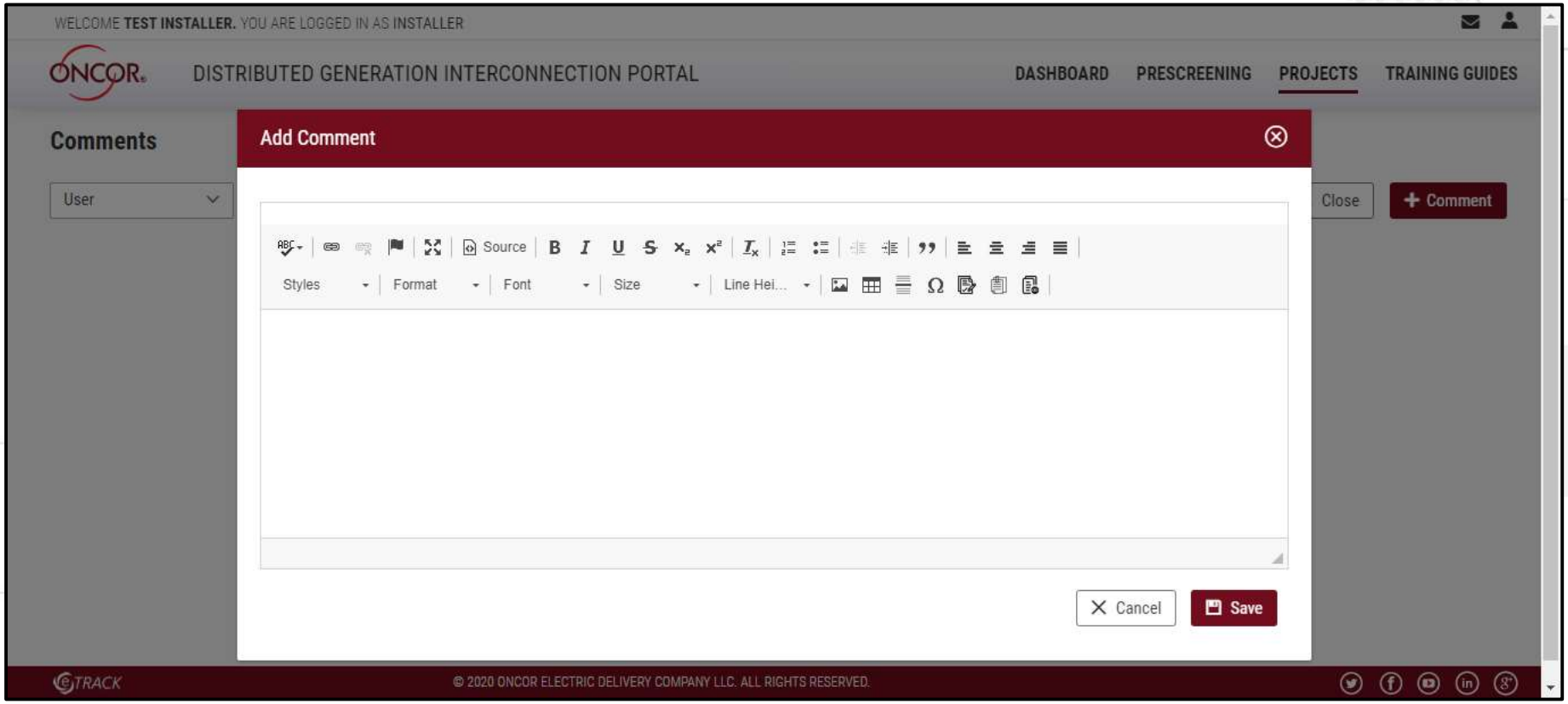
2.6 Add Comments



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

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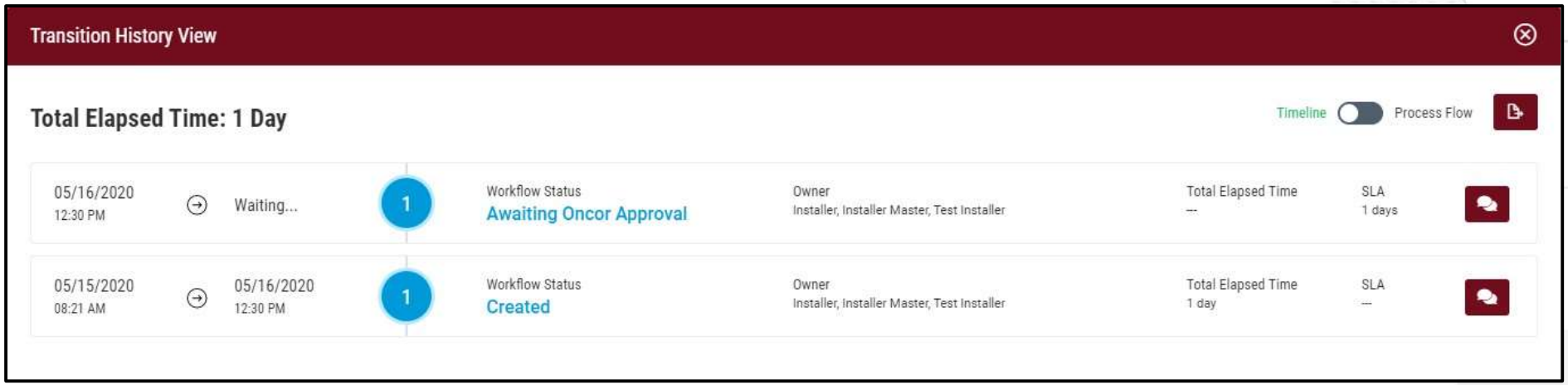
2.7 Comments – Timeline View



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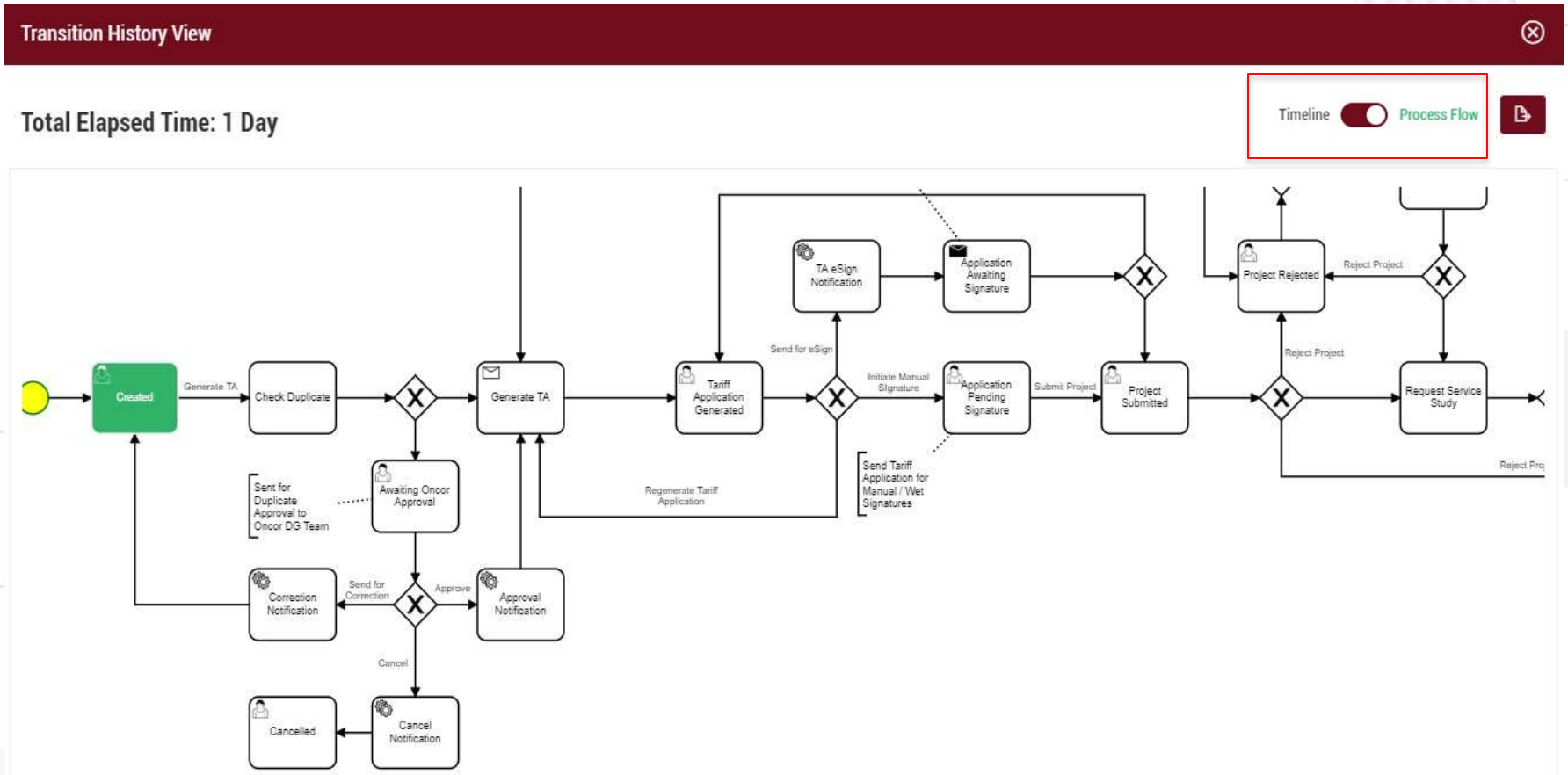
2.7.1 Comments – Process View



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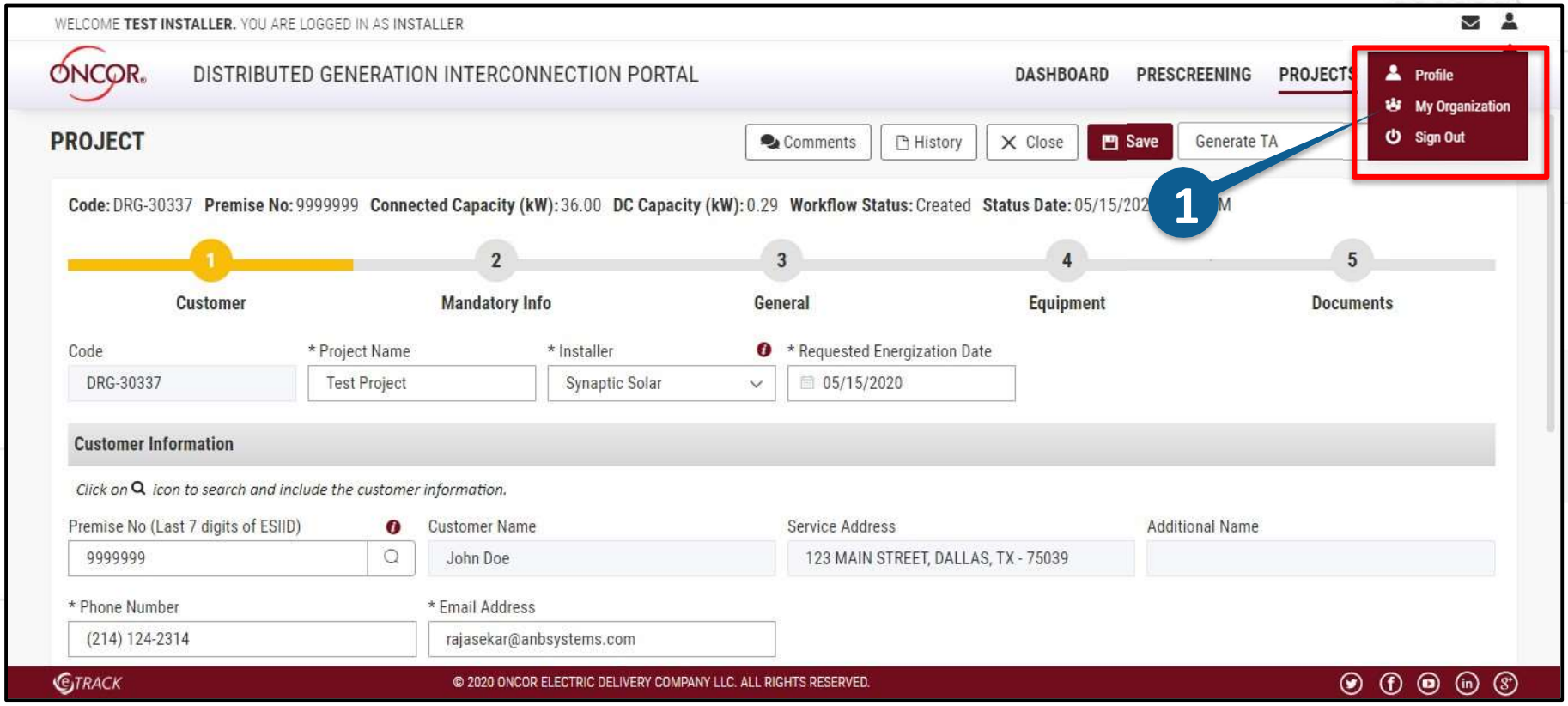
2.8 Account Menu Bar



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

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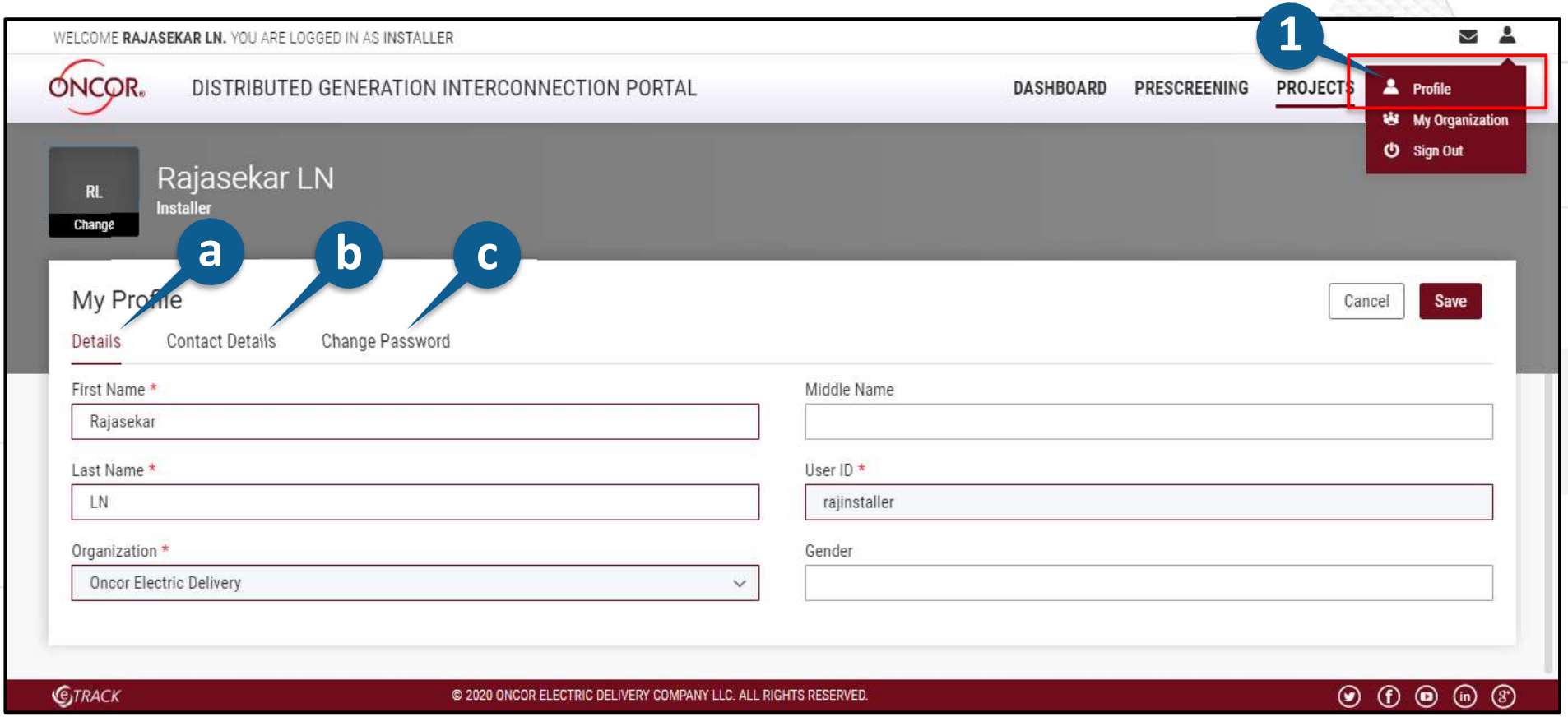
2.9 My Profile



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

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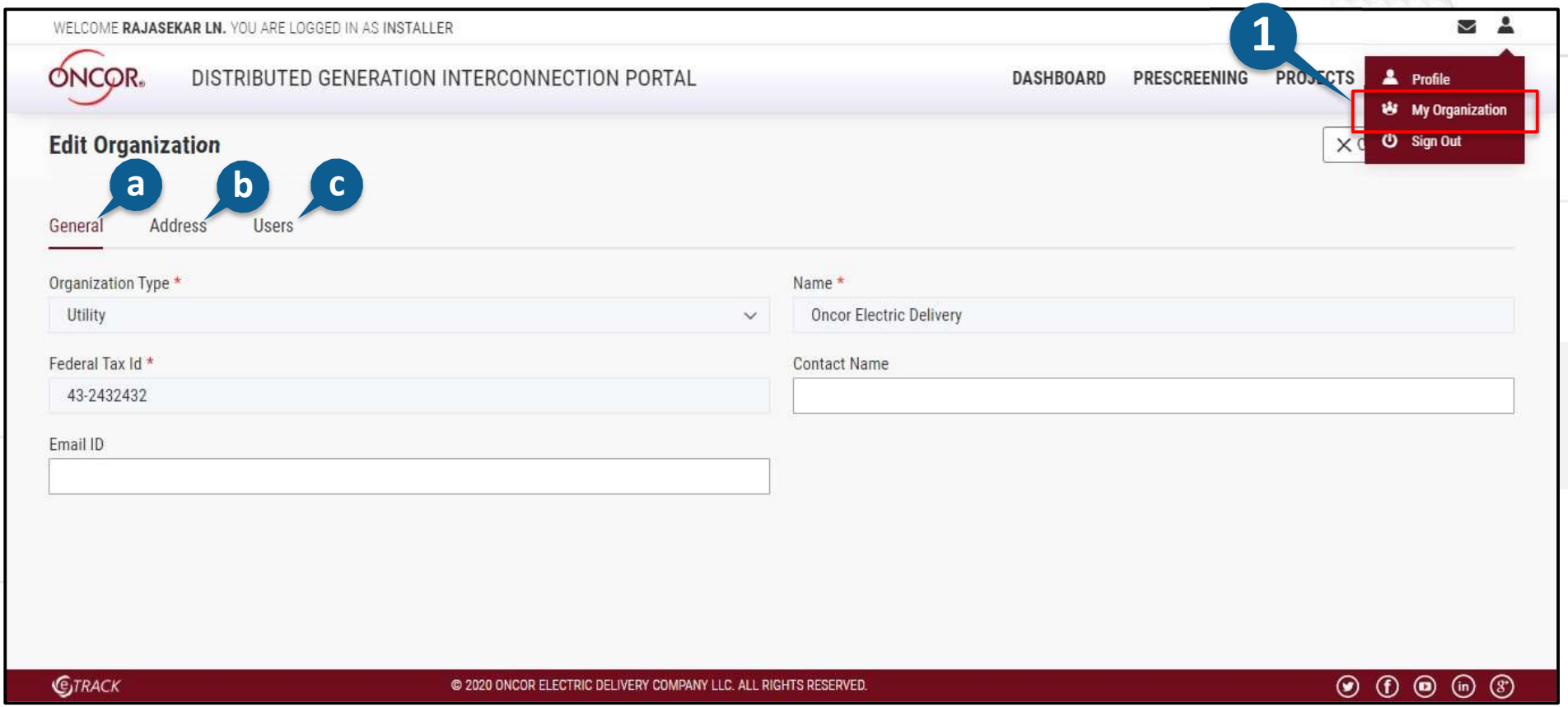
2.10 My Organization



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

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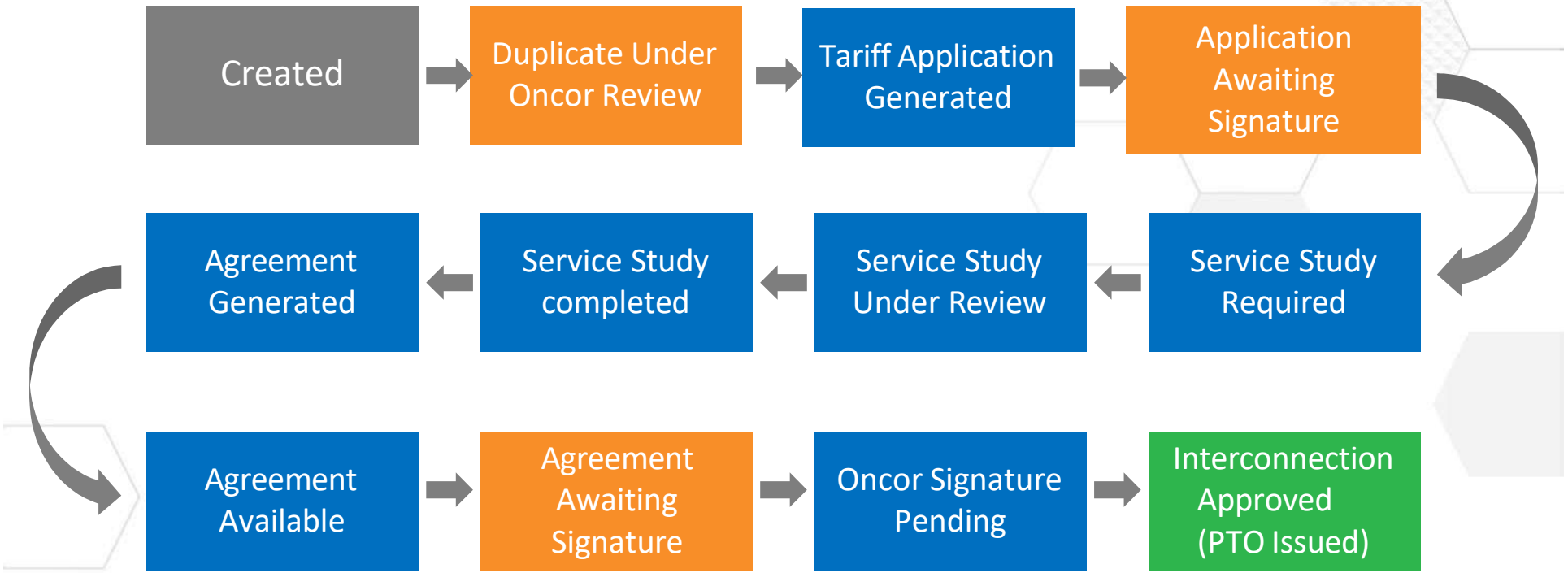
3. Small Systems Workflow



- 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

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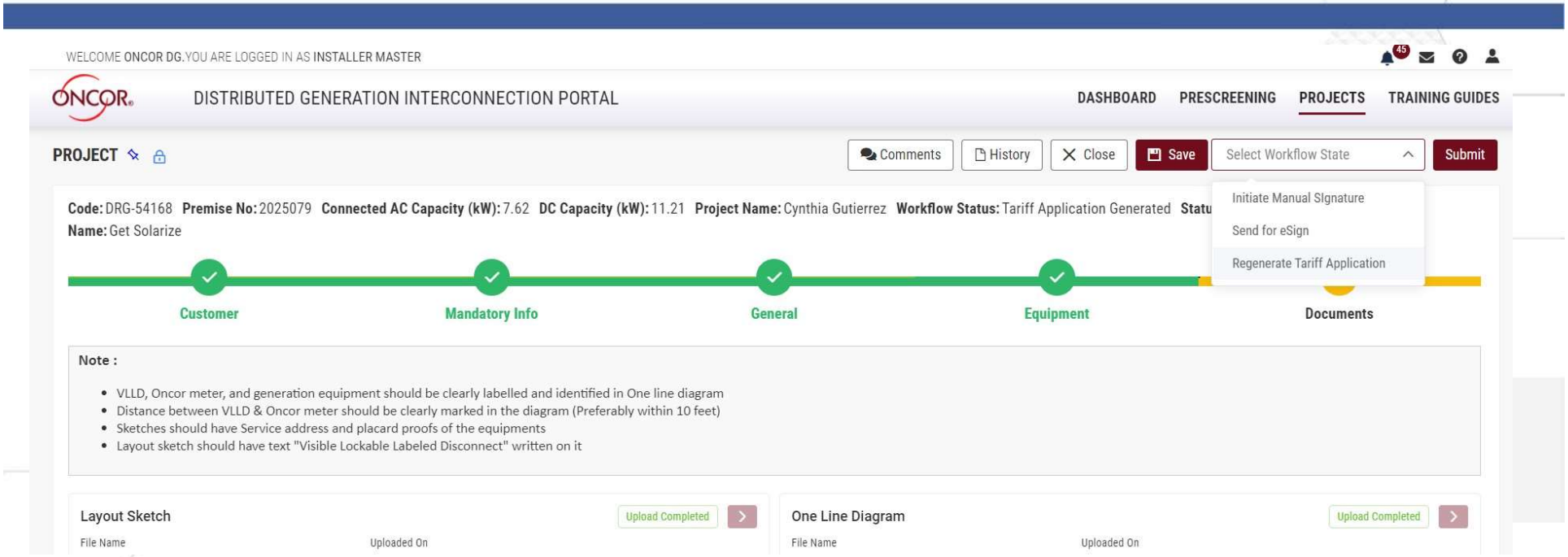
3.1 Hardcopy Tariff Process



- 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.

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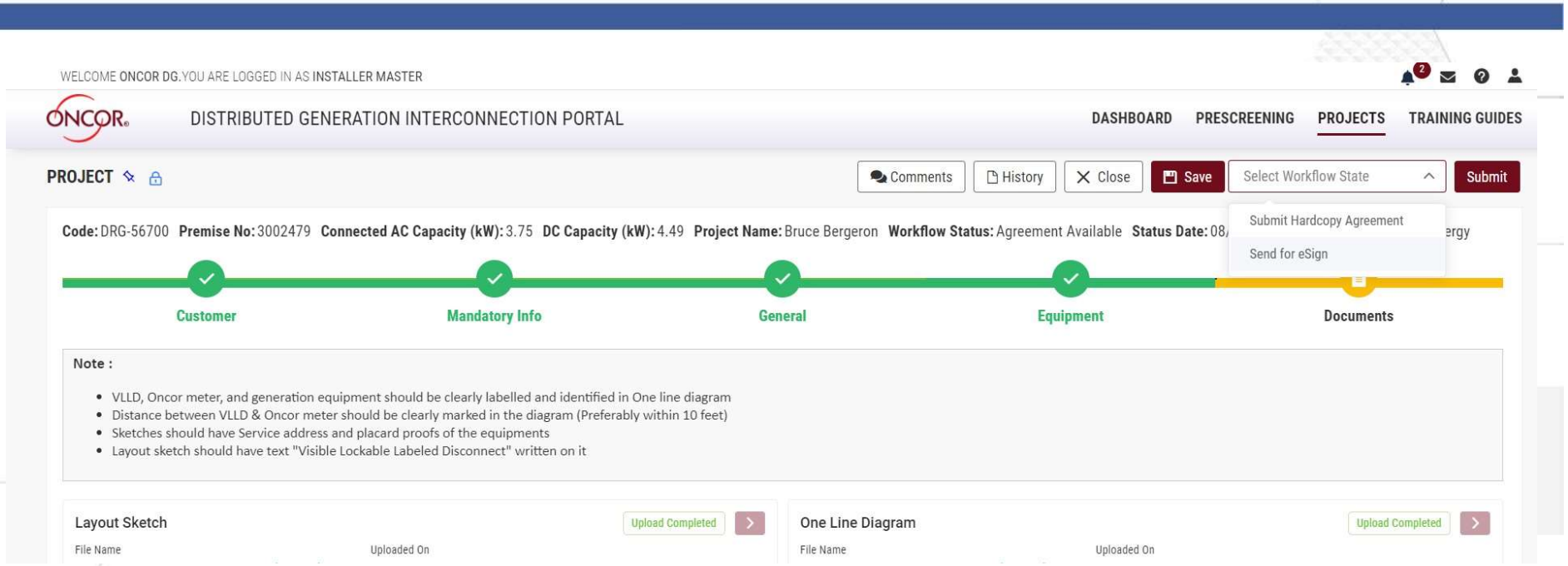
3.2 Hardcopy IA submittal Process



- 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.

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4. NEW INSTALLER SIGN-UP AND APPROVAL PROCEDURE

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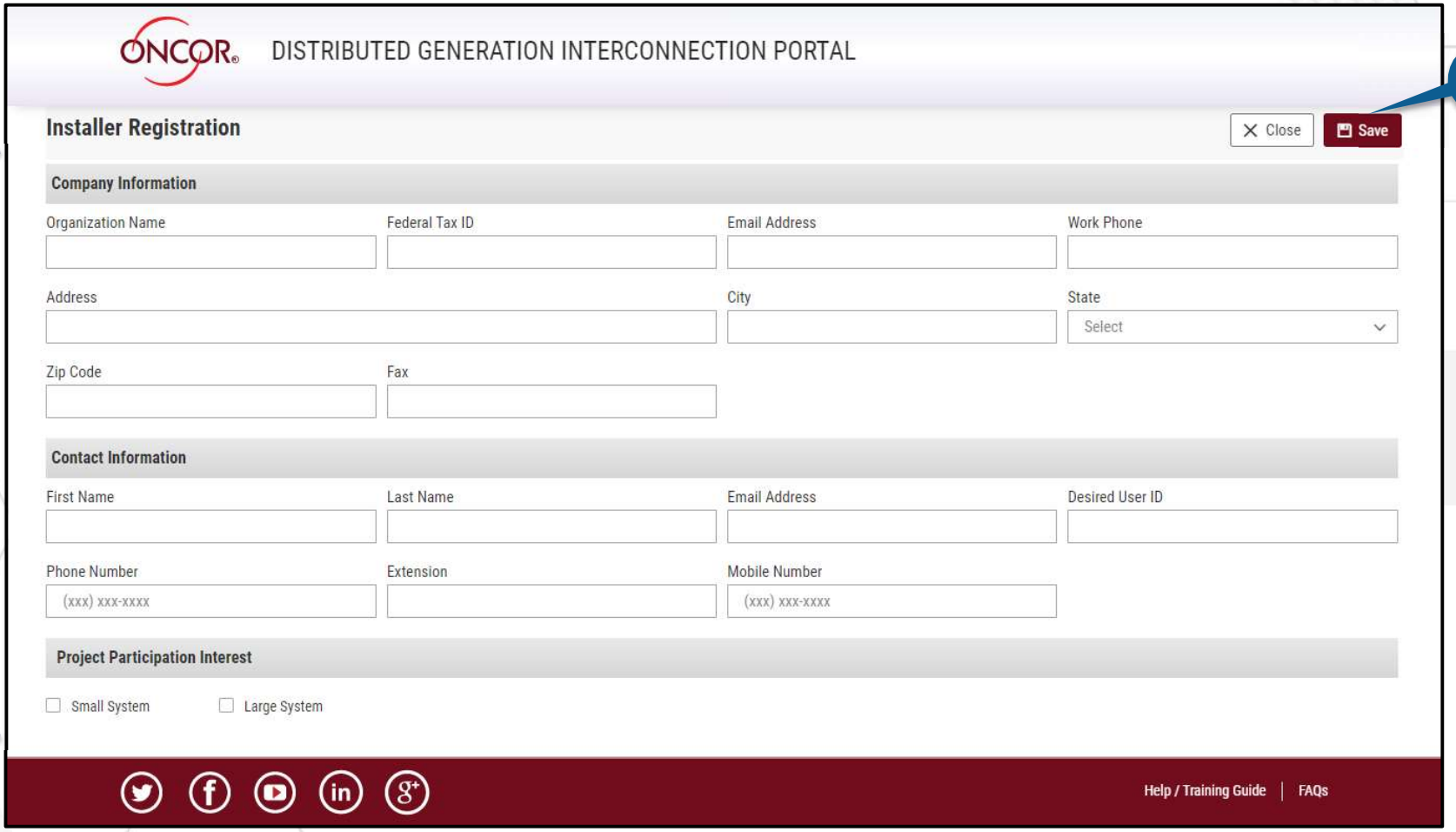
4. New Installer Sign-Up Form



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

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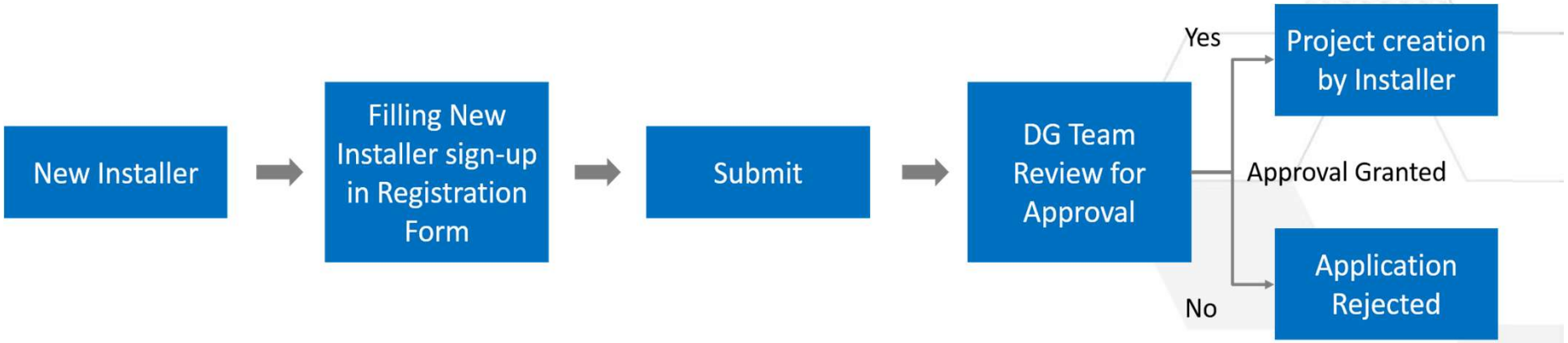
4.1 Approval Procedures



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

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5. INTRODUCTION TO TABS IN THE PORTAL

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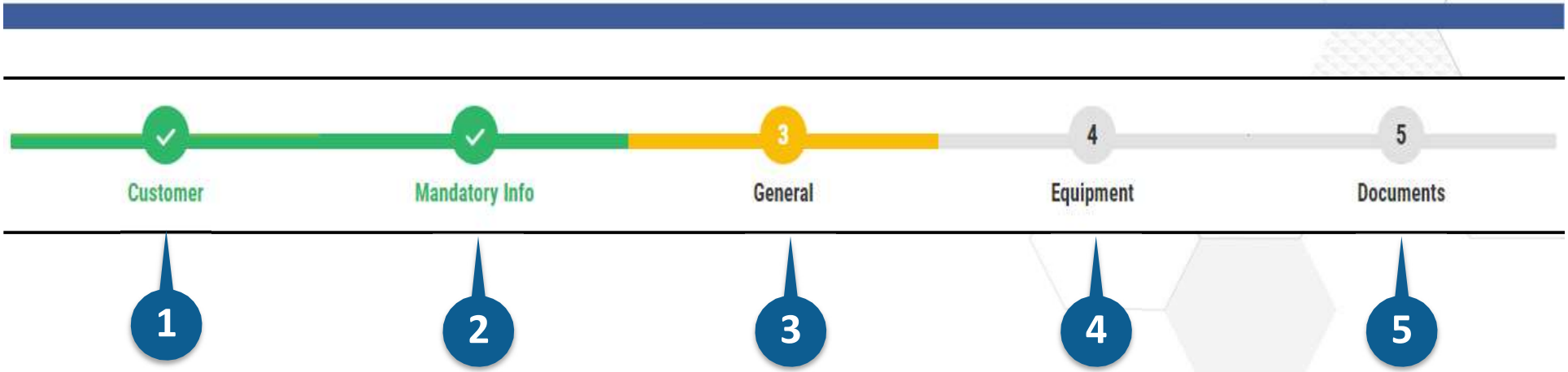
5. Introduction to Tabs in the Portal



Five Tabs for creating project:

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

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6. PROJECT CREATION

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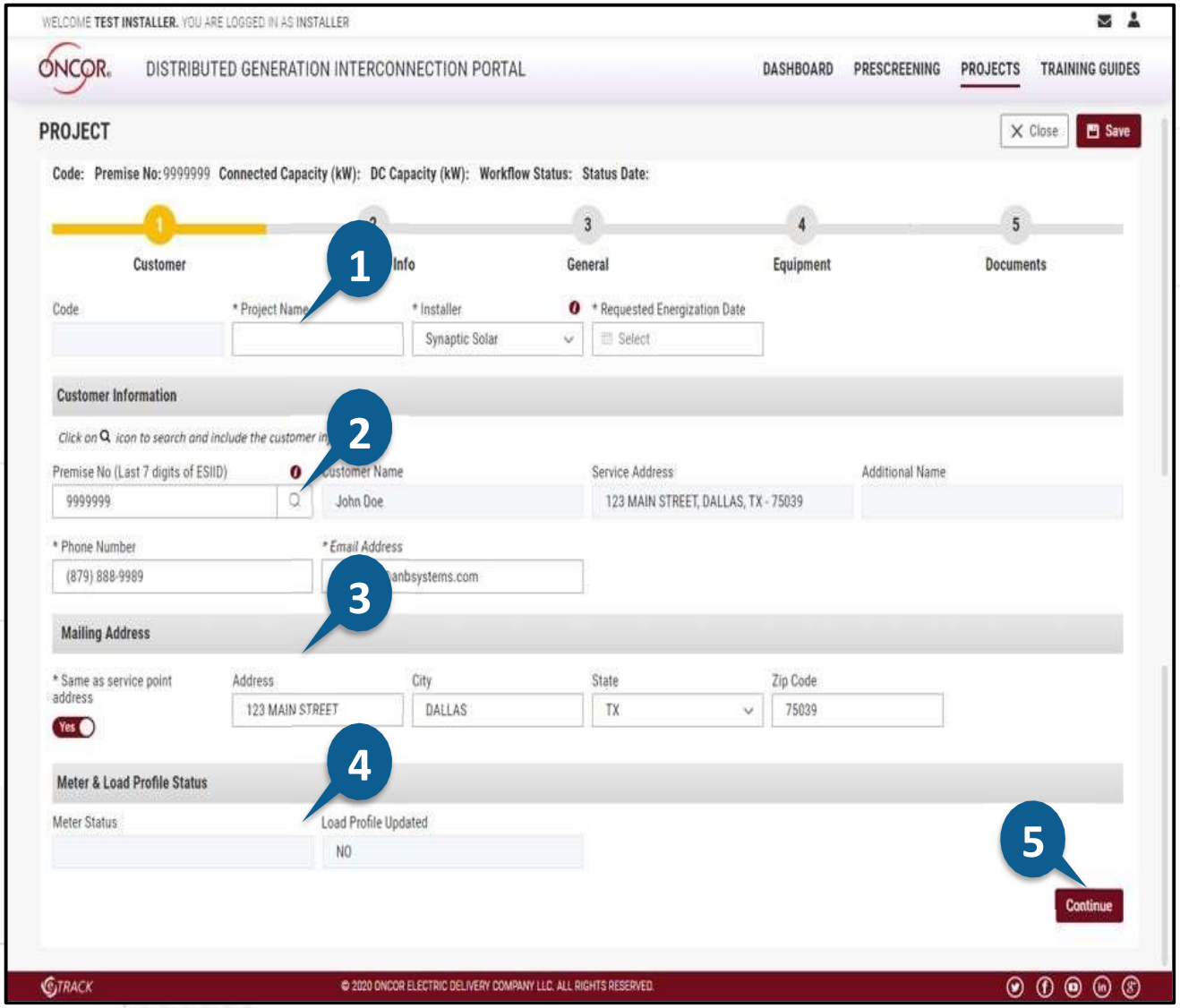
6.1 Customer Tab



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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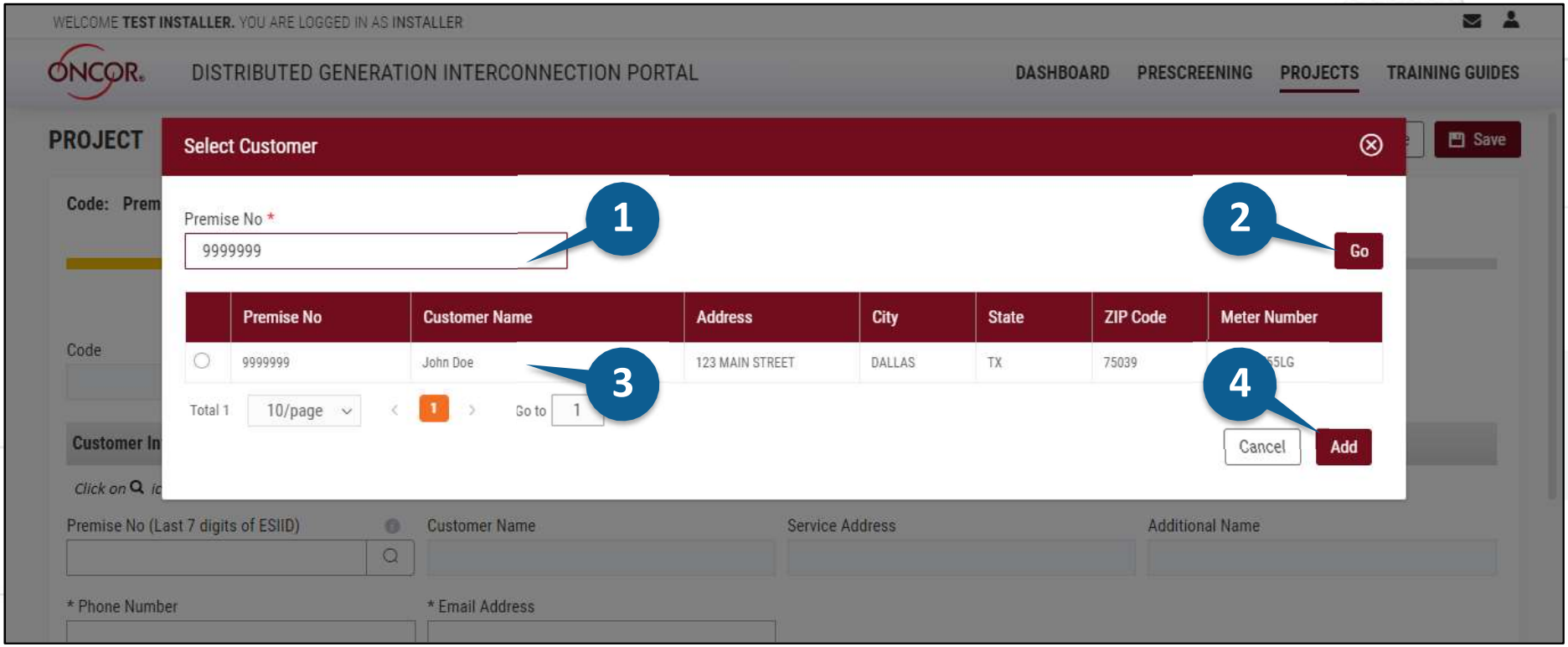
6.1.1 Customer Tab – Add Premise



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**

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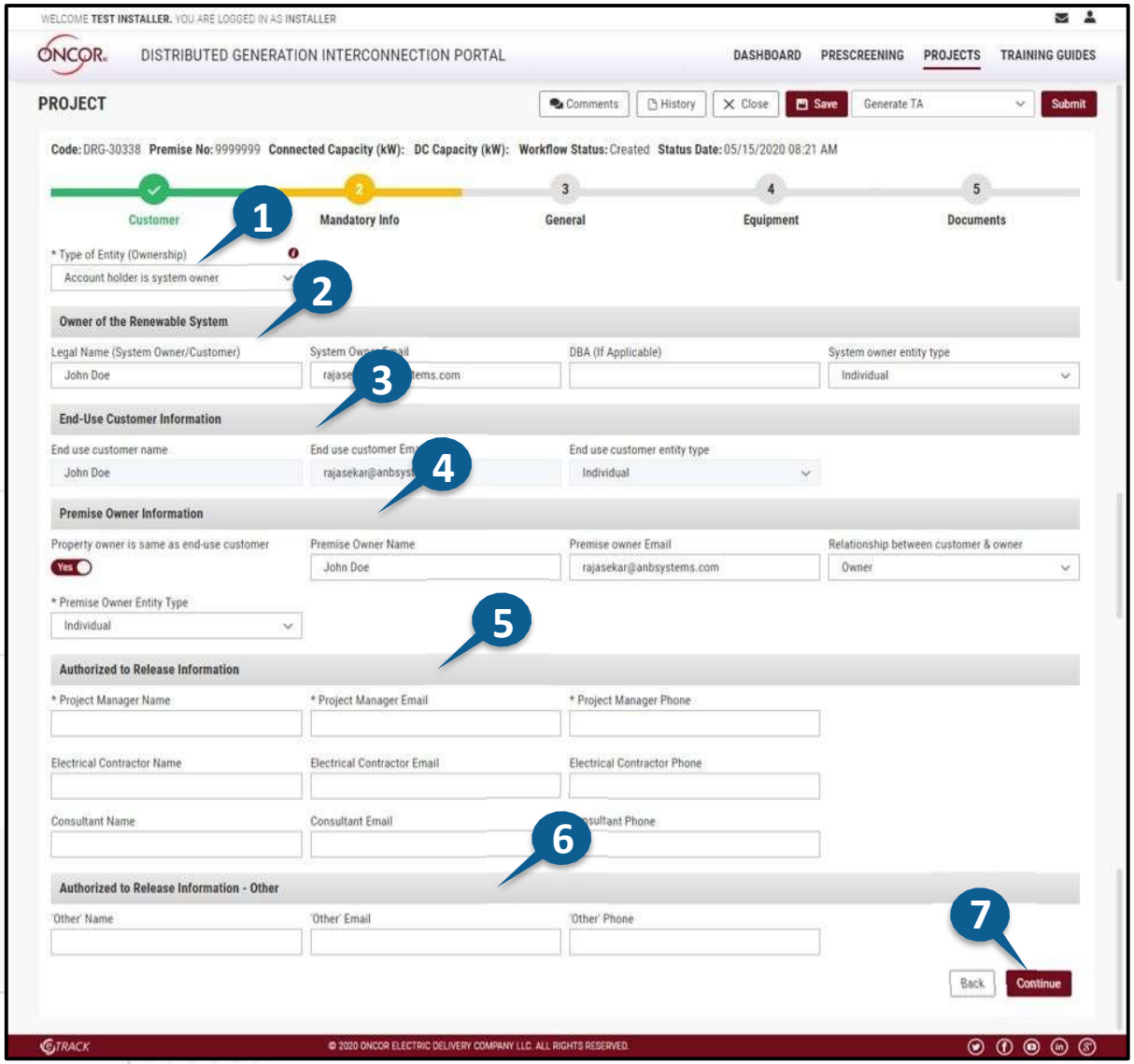
6.2 Mandatory Info Tab



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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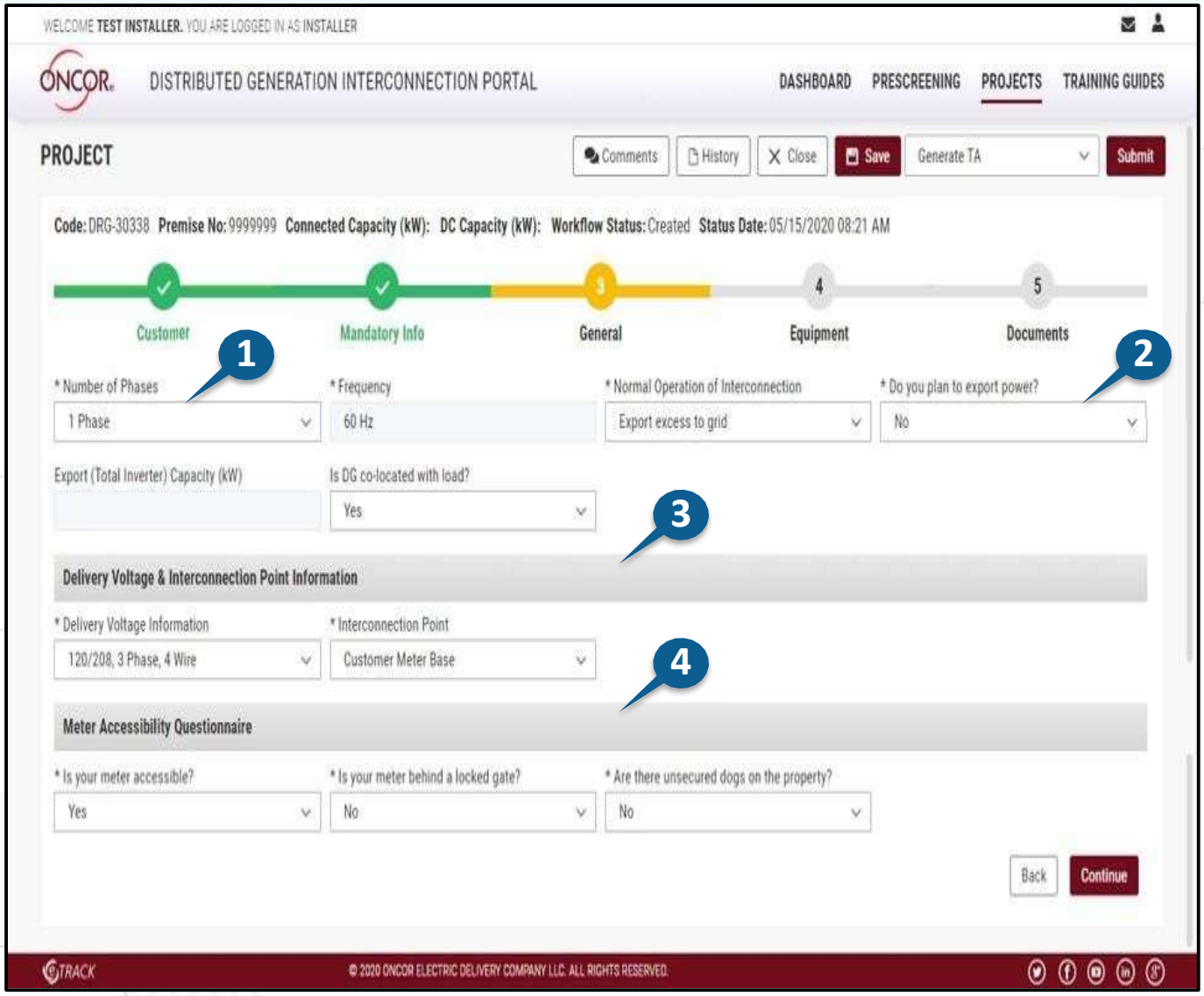
6.3 General Tab



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

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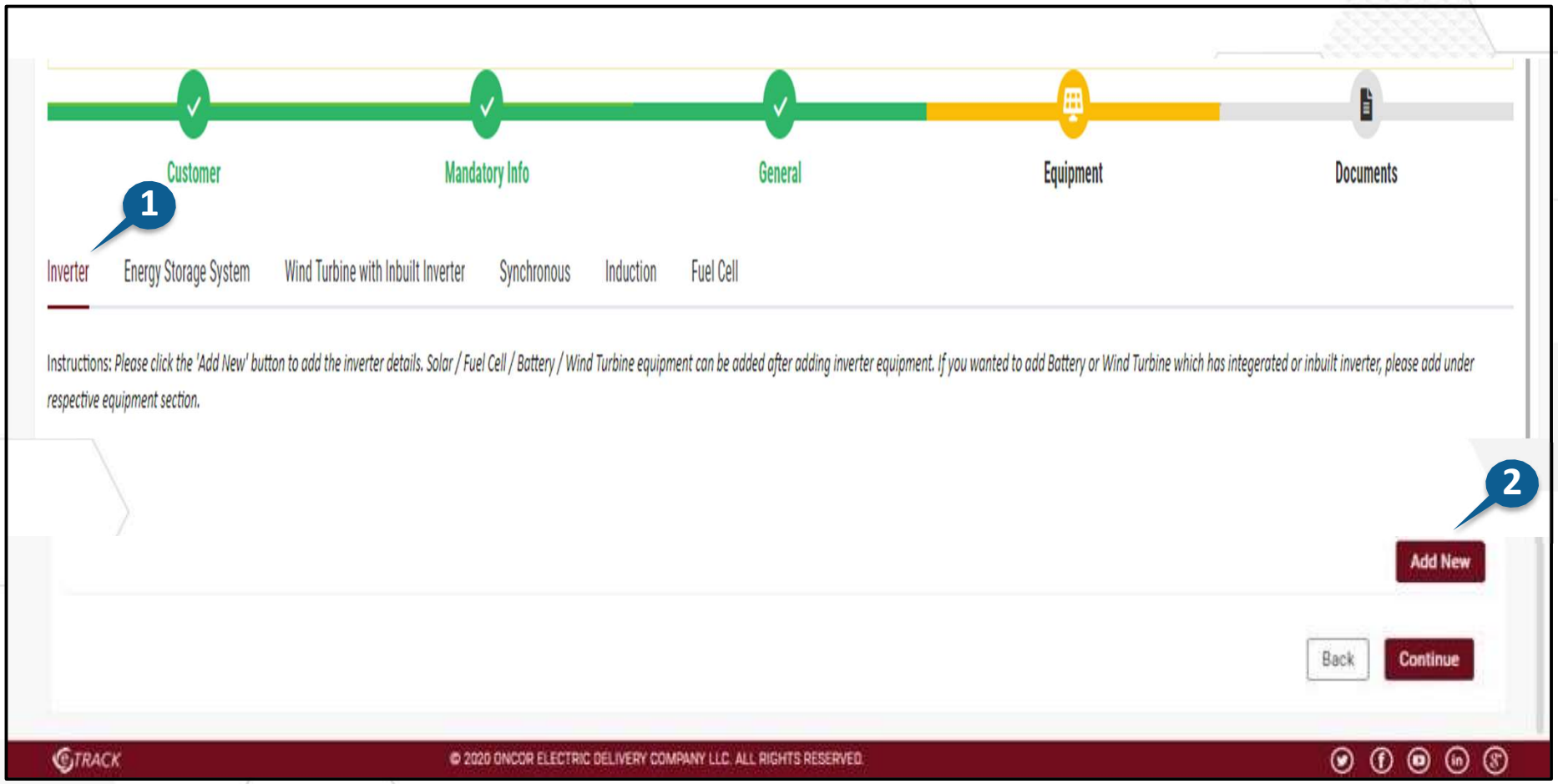
6.4. Equipment Tab (1/6)



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

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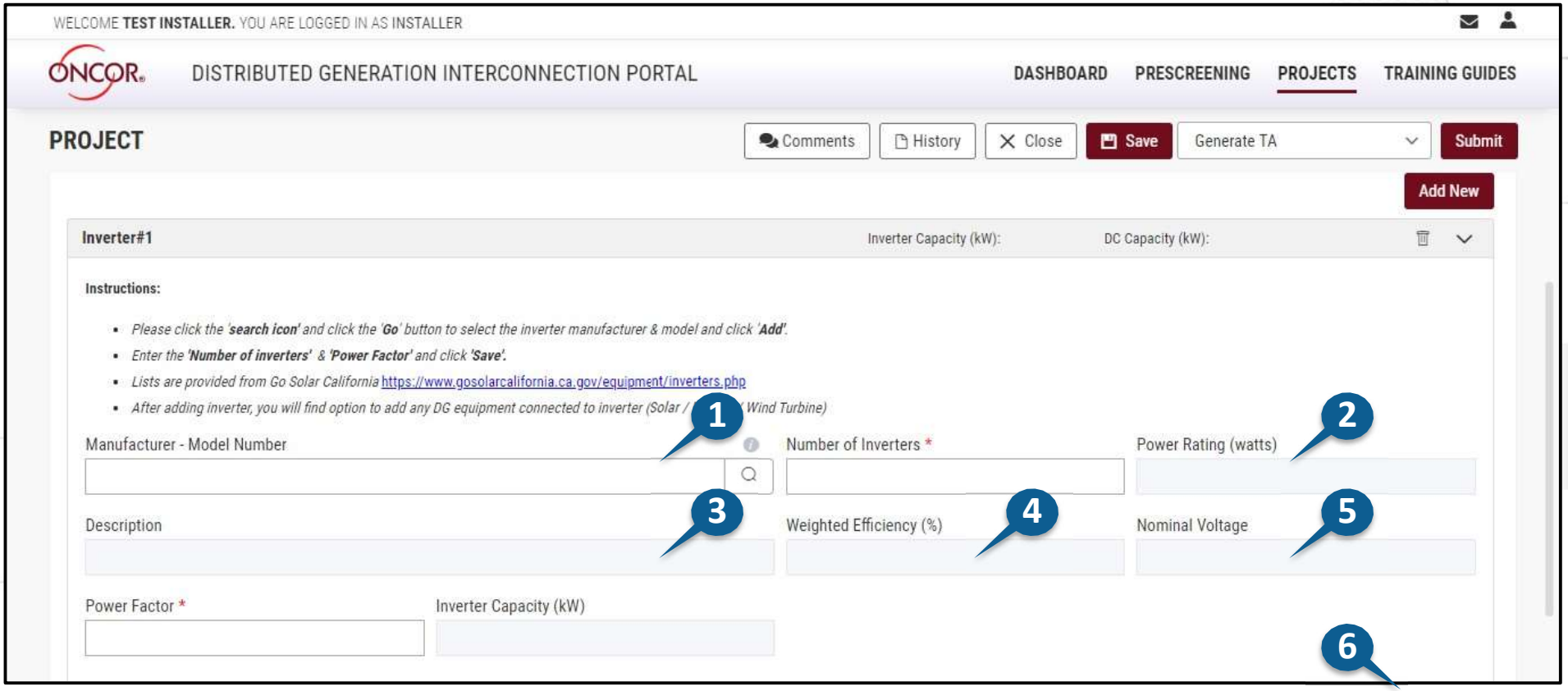
6.4.1 Equipment Tab (2/6) – Inverter



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

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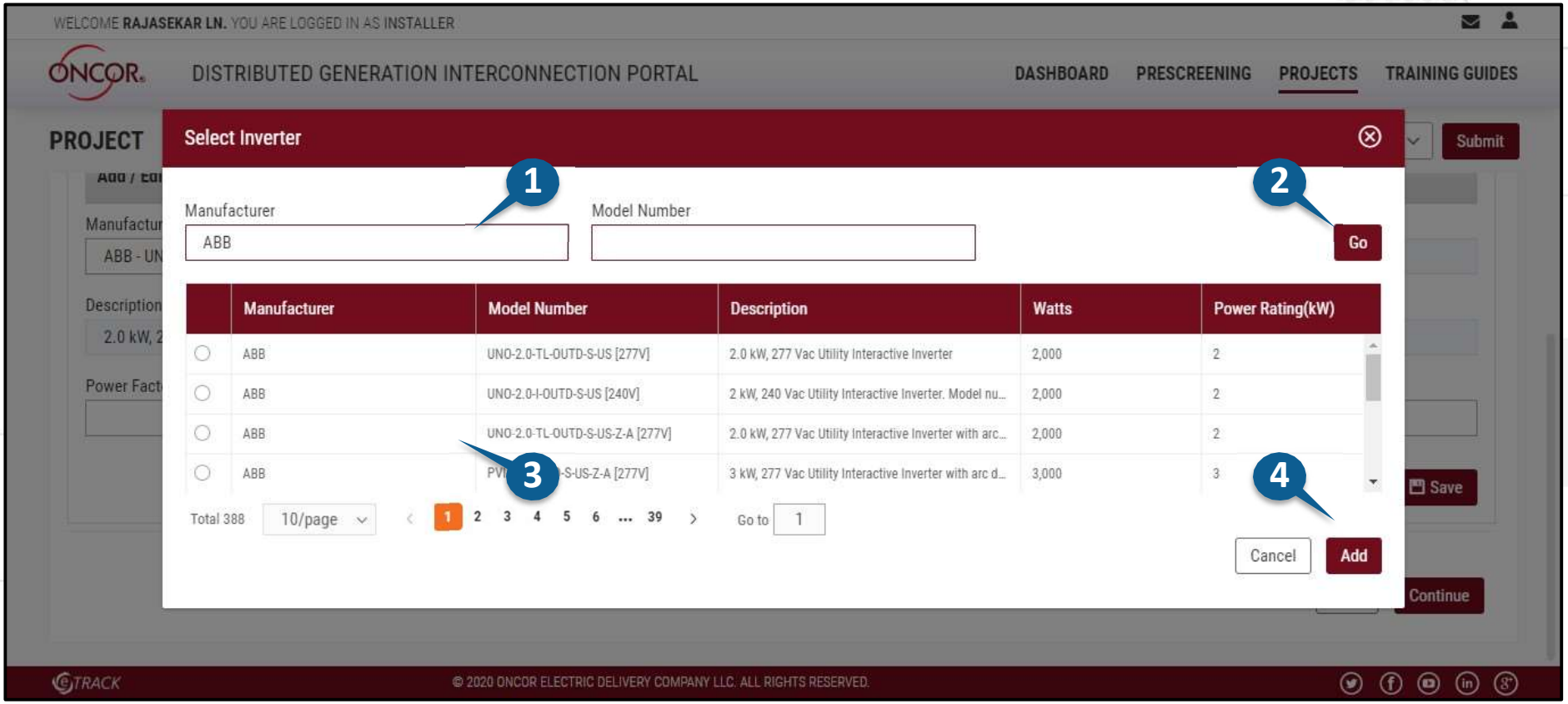
6.4.2 Adding Equipments in Equipment Tab (3/6) - Inverter



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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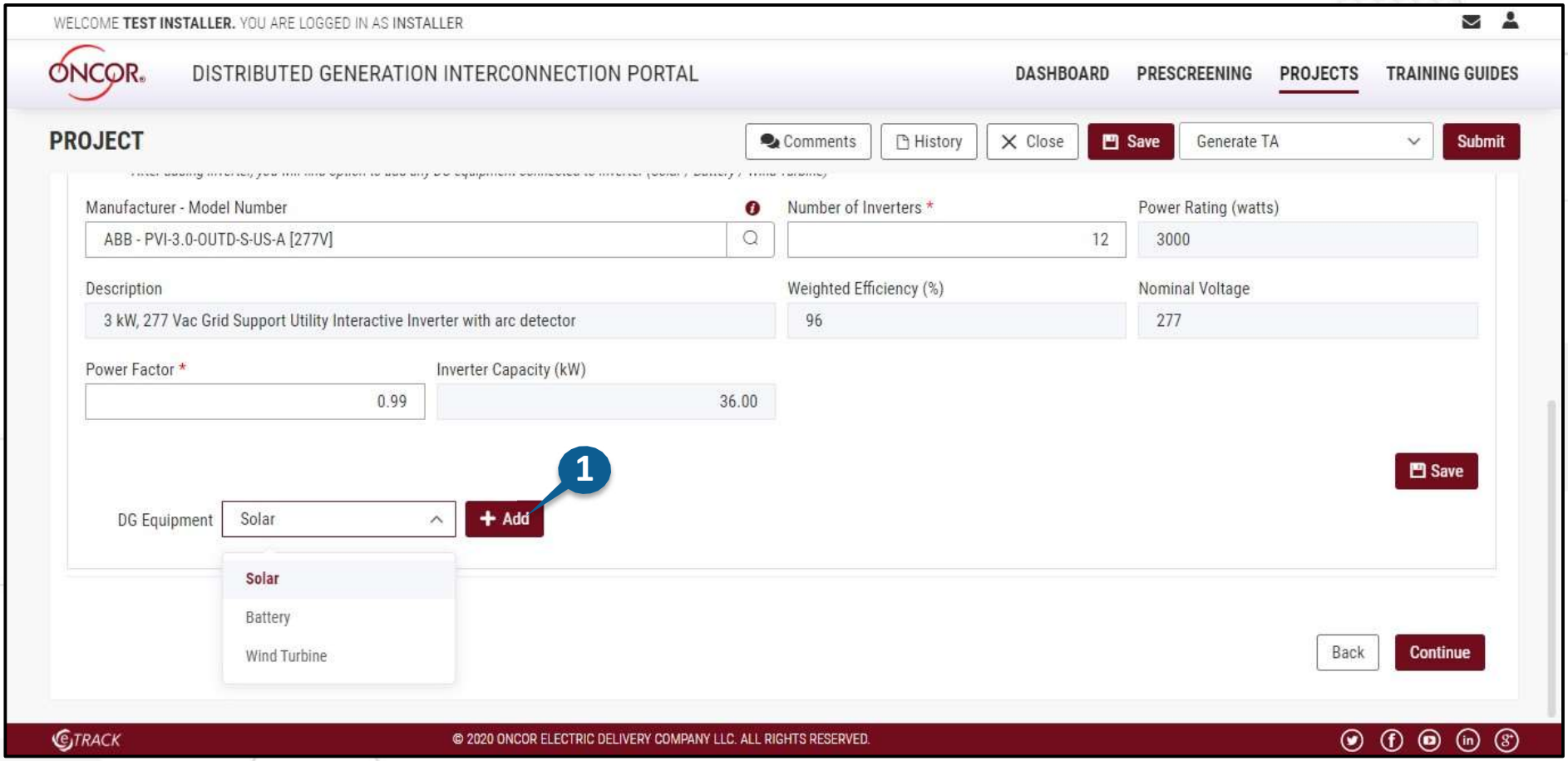
6.4.3 Equipment Tab (4/6)



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.

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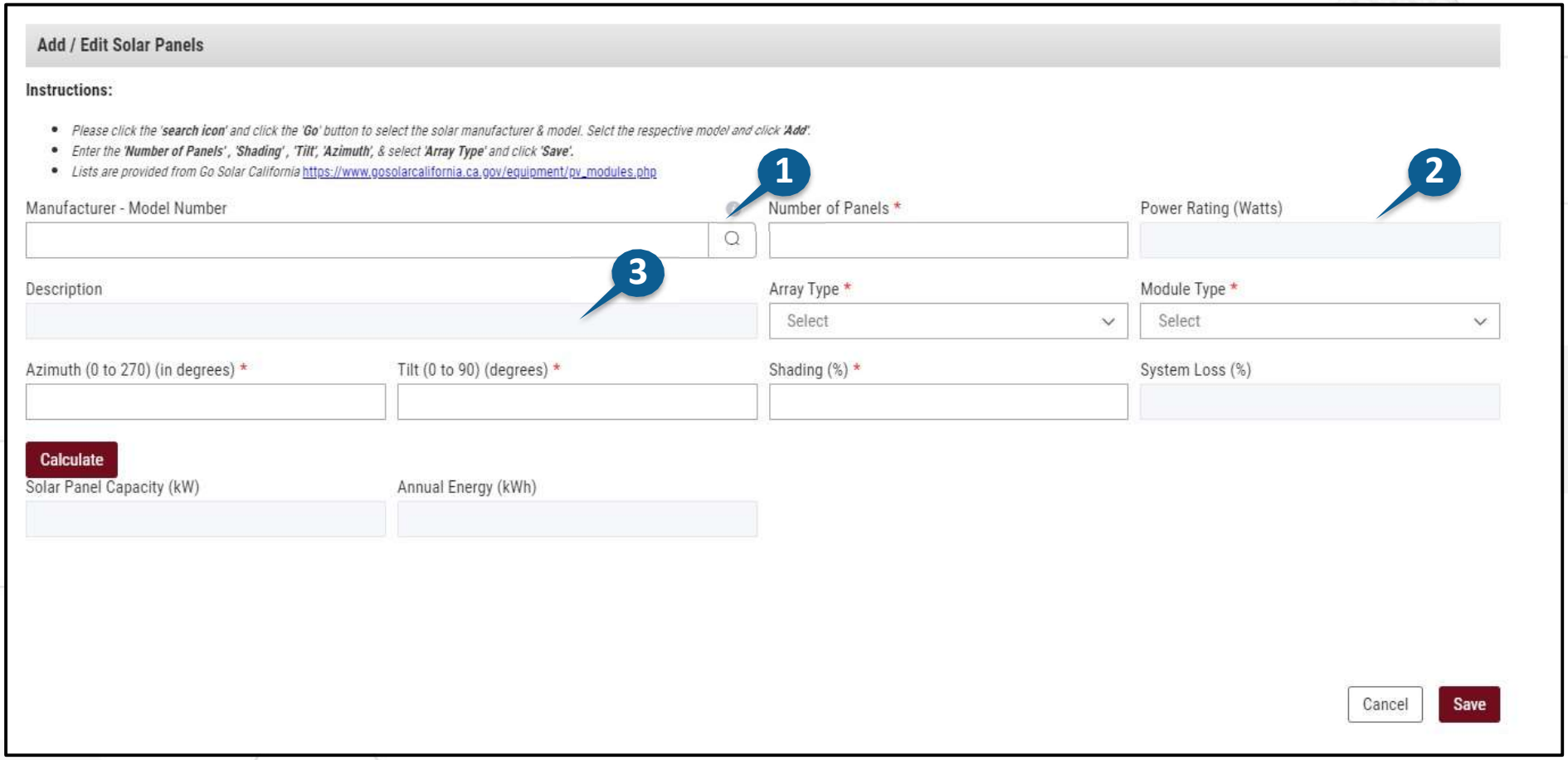
6.4.4 Equipment Tab (5/6)



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

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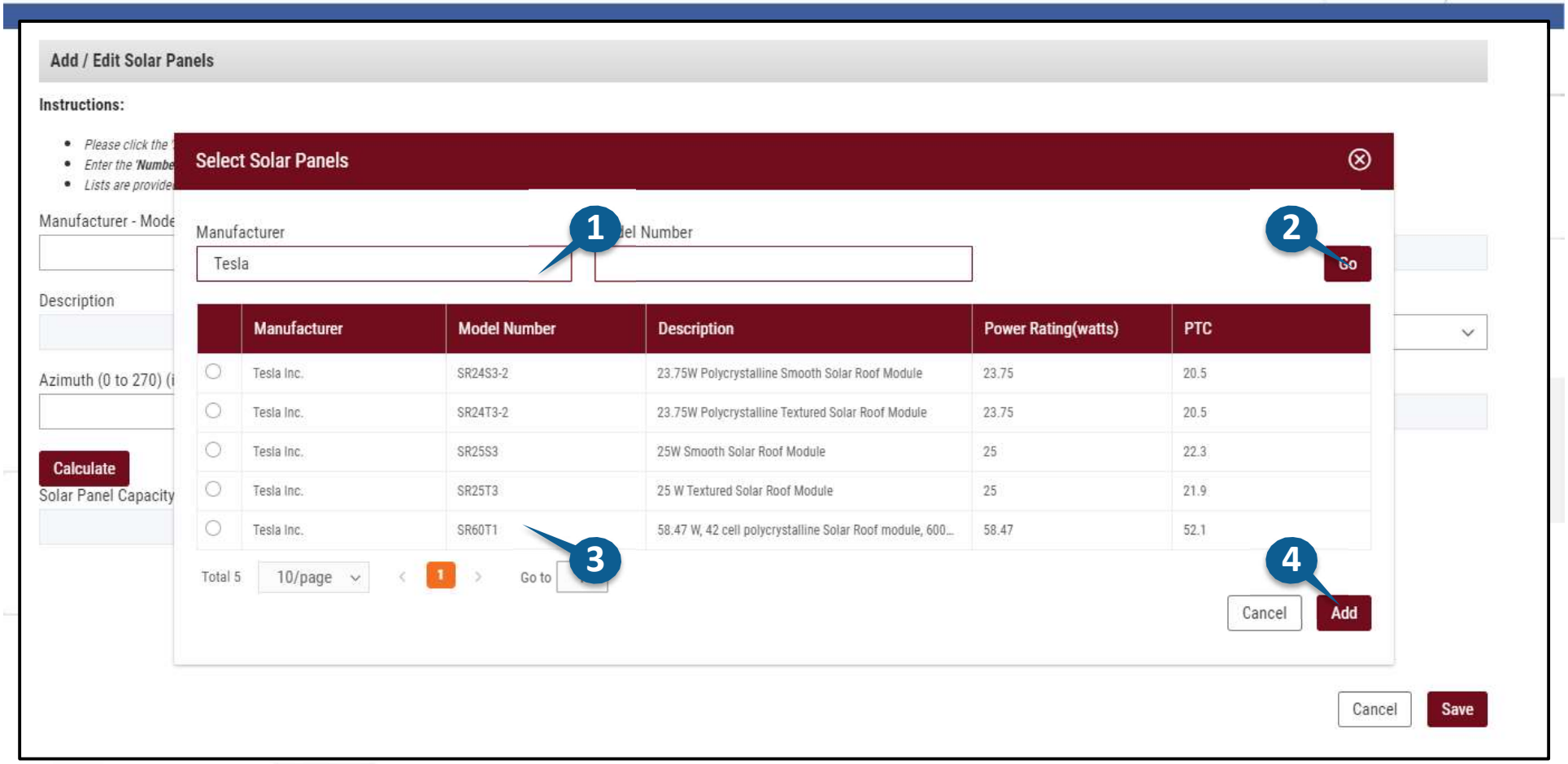
6.4.5 Equipment Tab (6/6)



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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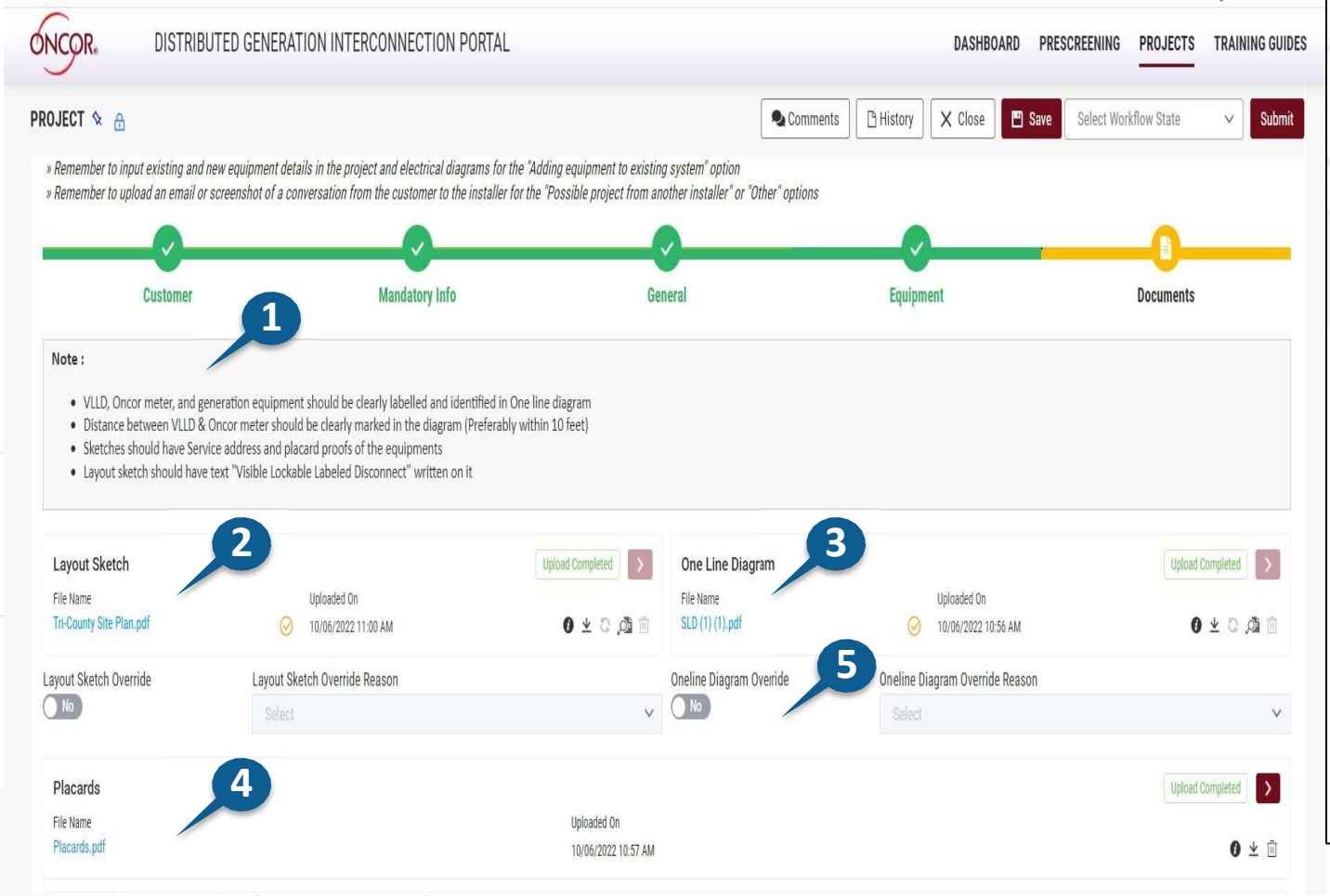
6.5 Documents Tab



1. Note: 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

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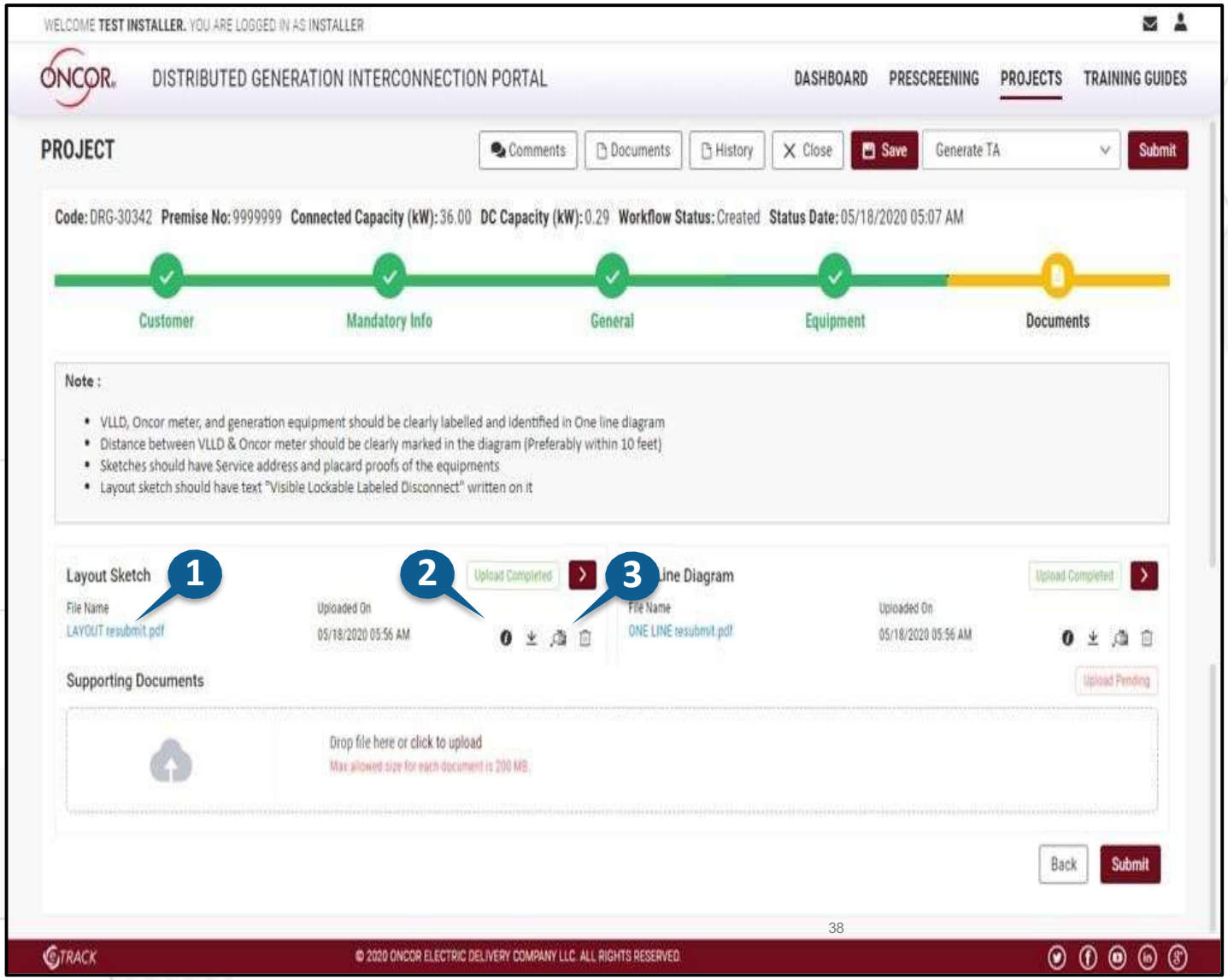
6.5.1 Documents Tab - Preview



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

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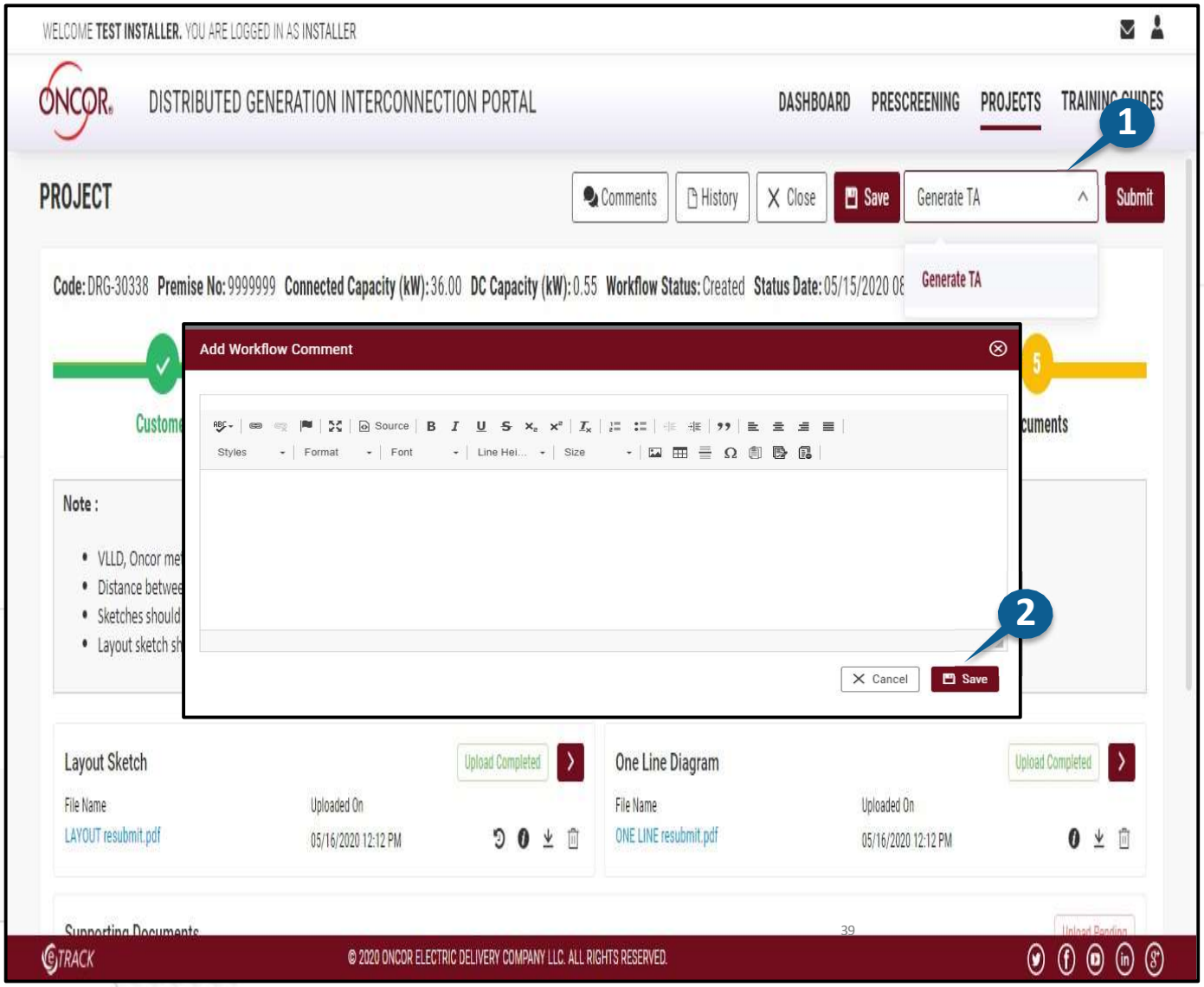
6.6 Workflow Movement



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**

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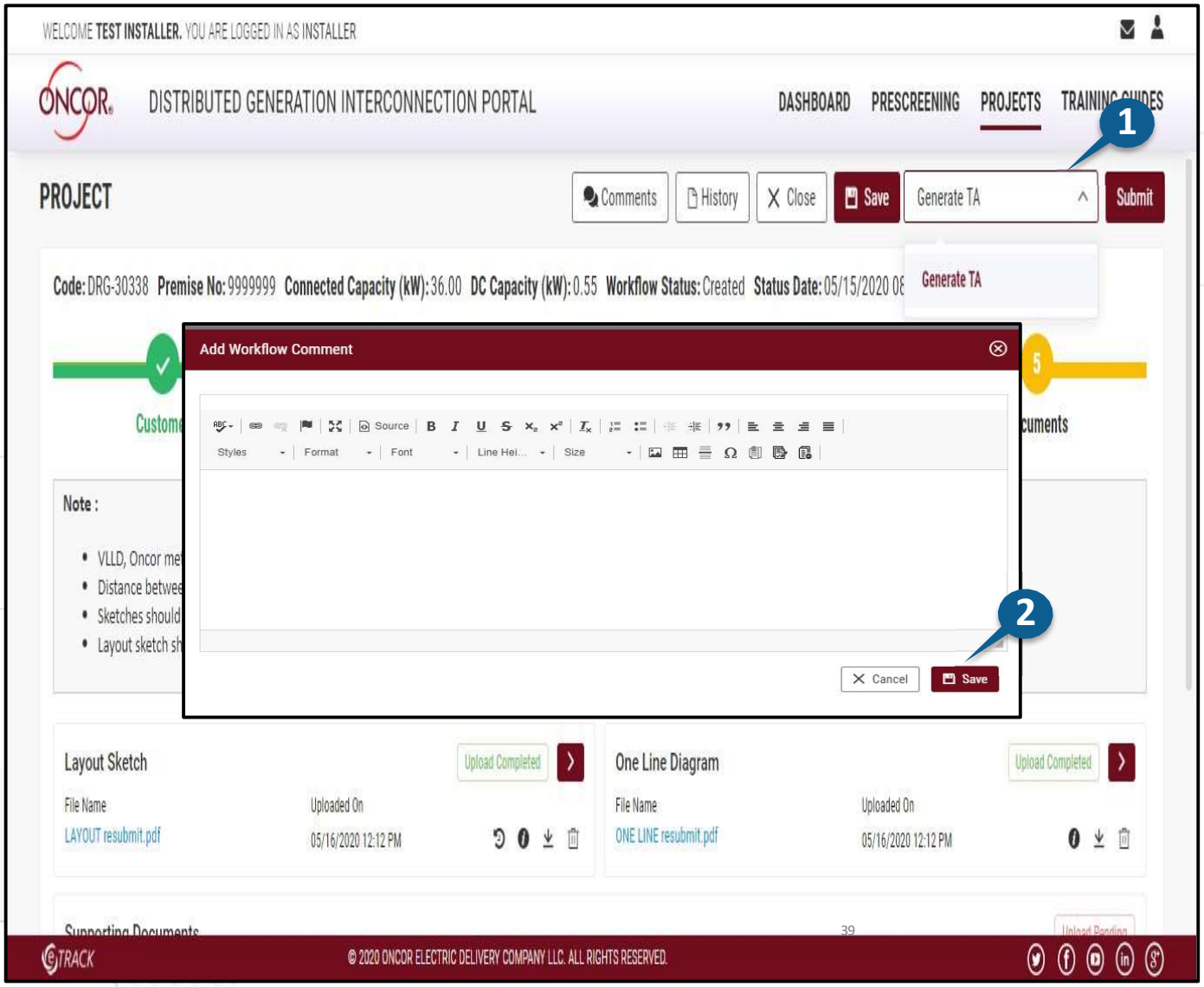
6.6 Workflow Movement



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**

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7. HIGH LEVEL CHANGES

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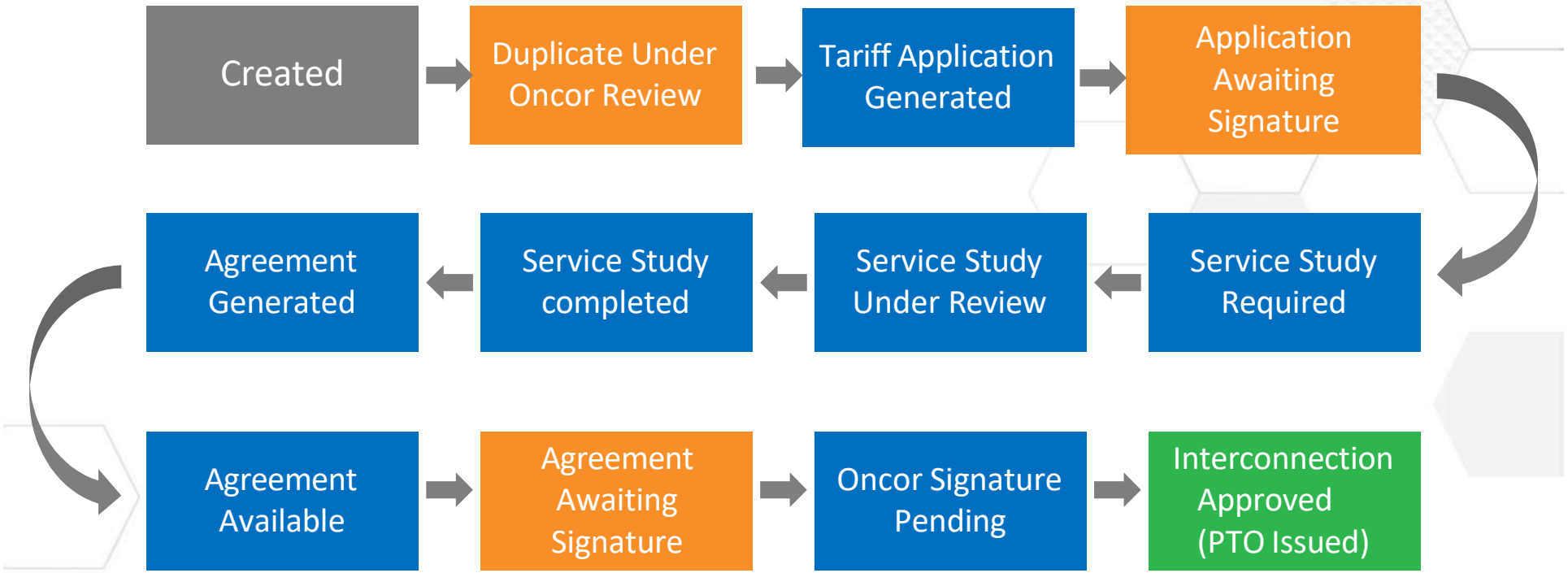
7. Workflow



- Duplicate Under Oncor Review occurs only if it is a duplicate project
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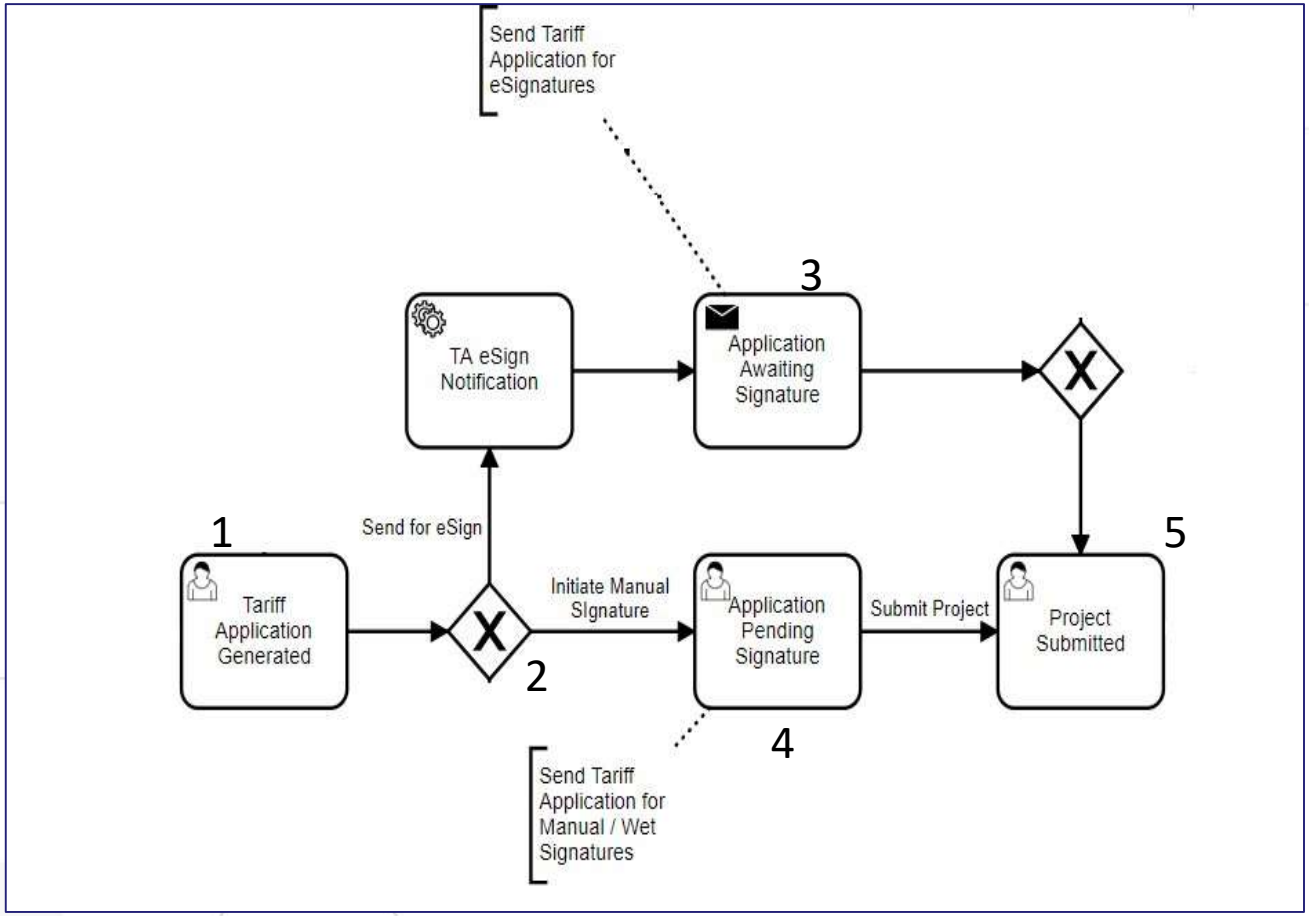
7.1 Tariff Application Section



Step 1: Tariff application has been generated

Step 2: Installer has the option to chose 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

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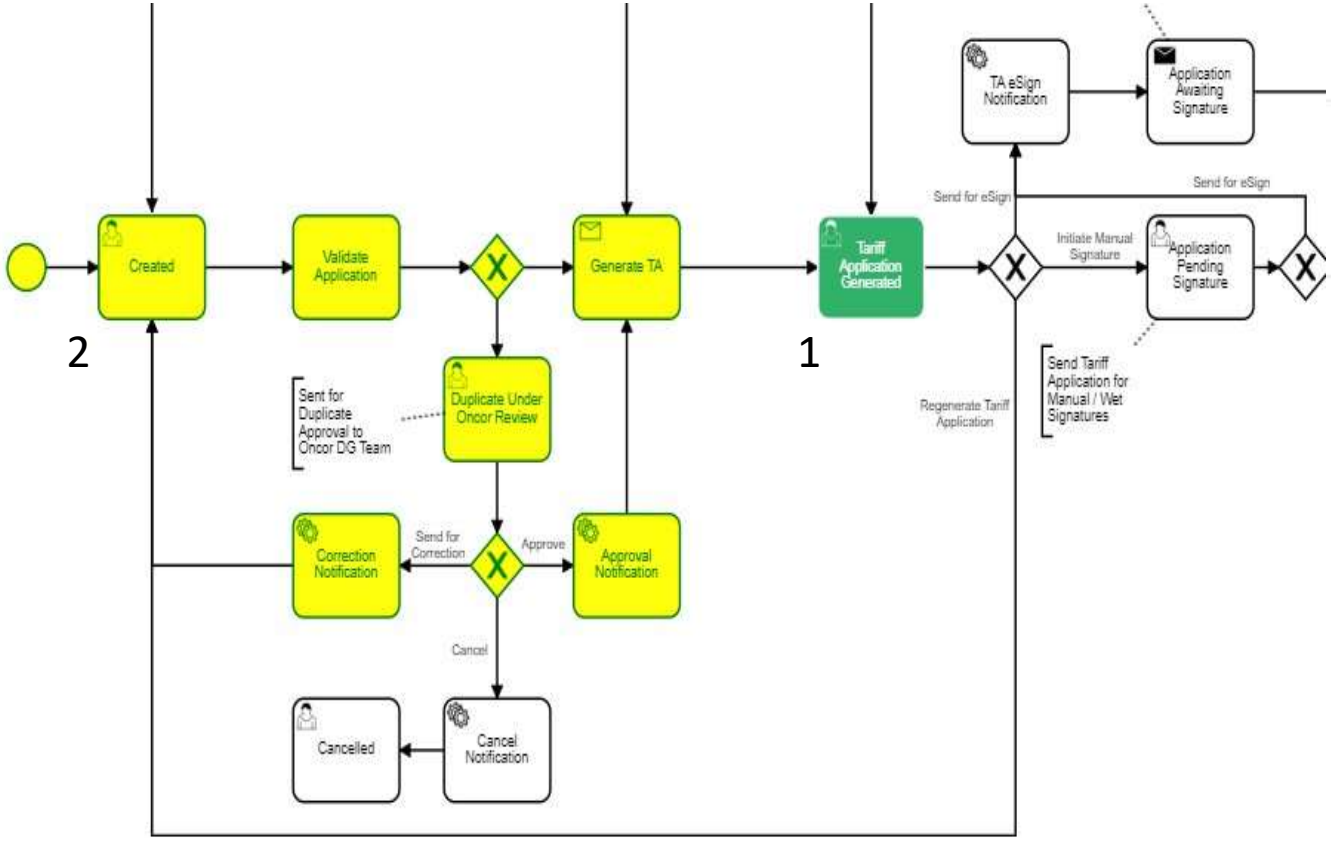
7.1.1 Tariff Application Section Contd.



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

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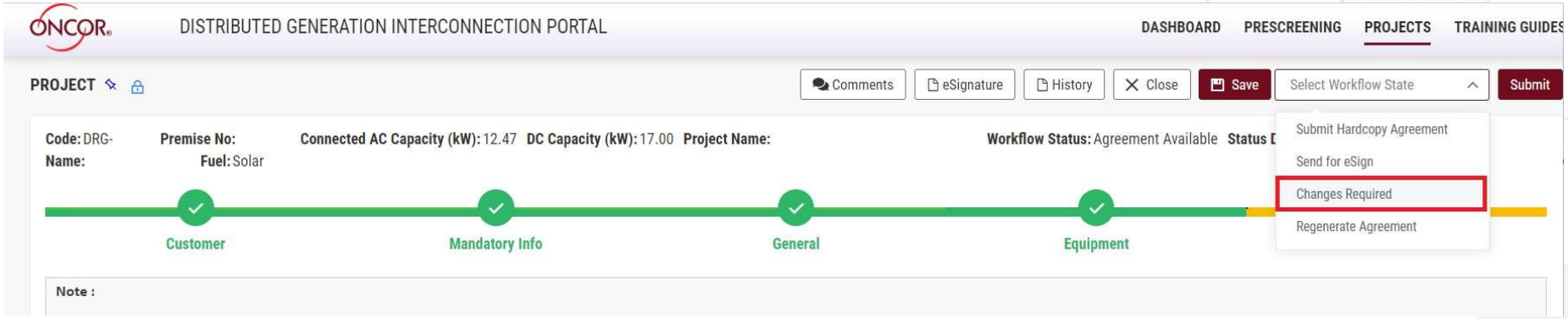
7.2 Agreement Available status



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)

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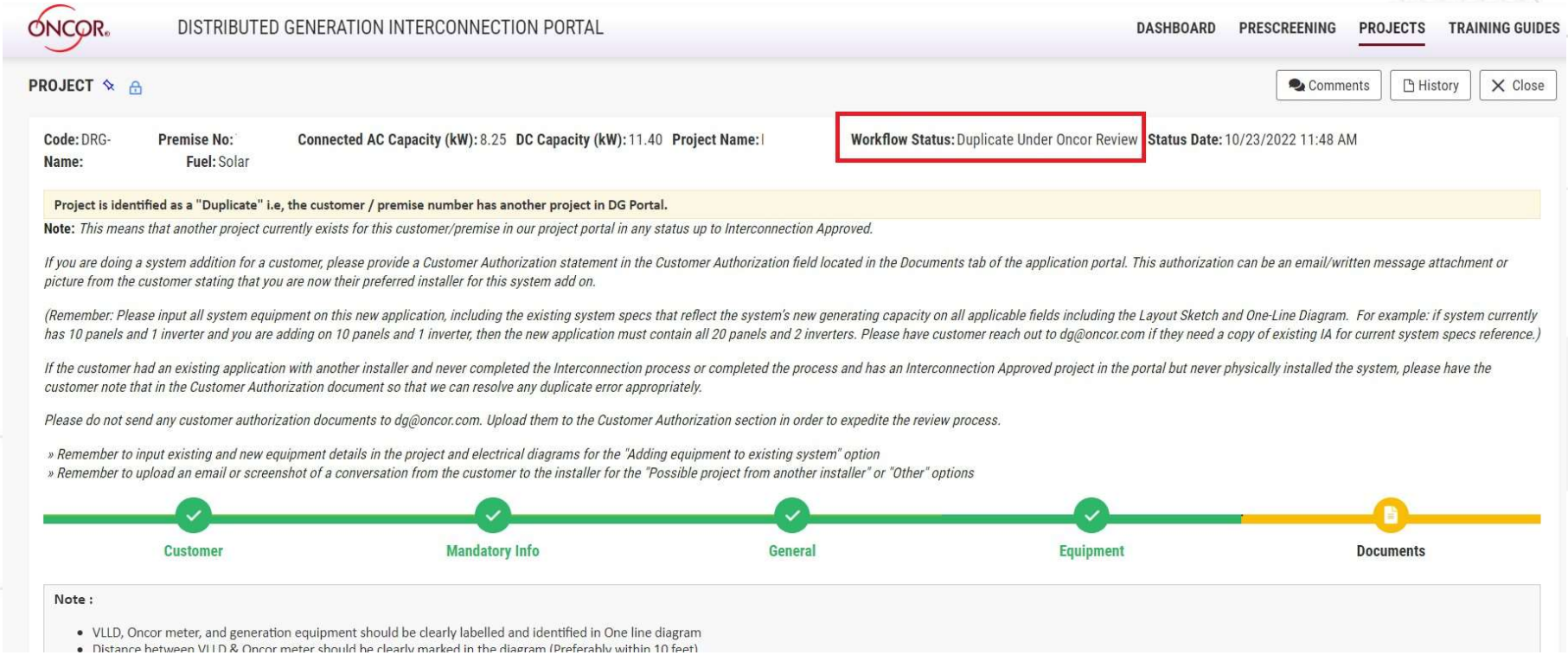
7.3 Duplicate Check



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

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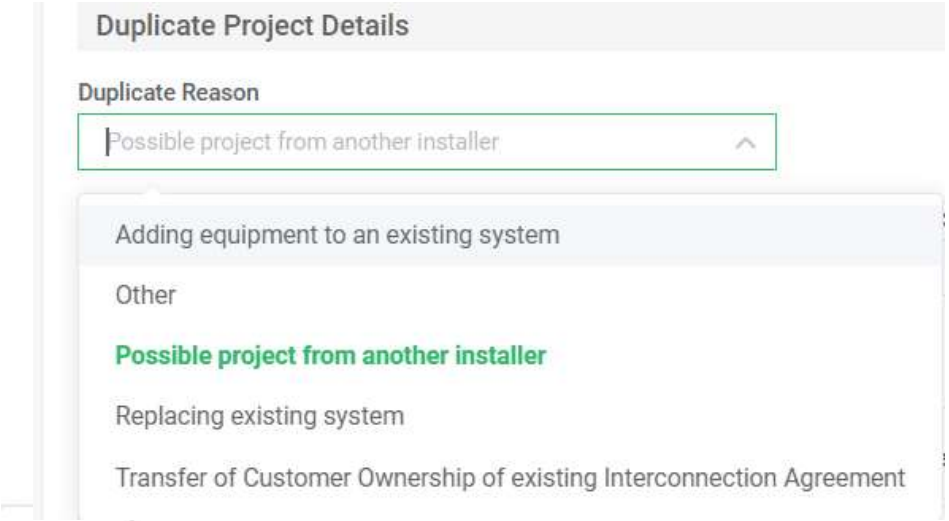
7.3.1 Duplicate Types



- Adding equipment to an existing system- Exiting 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

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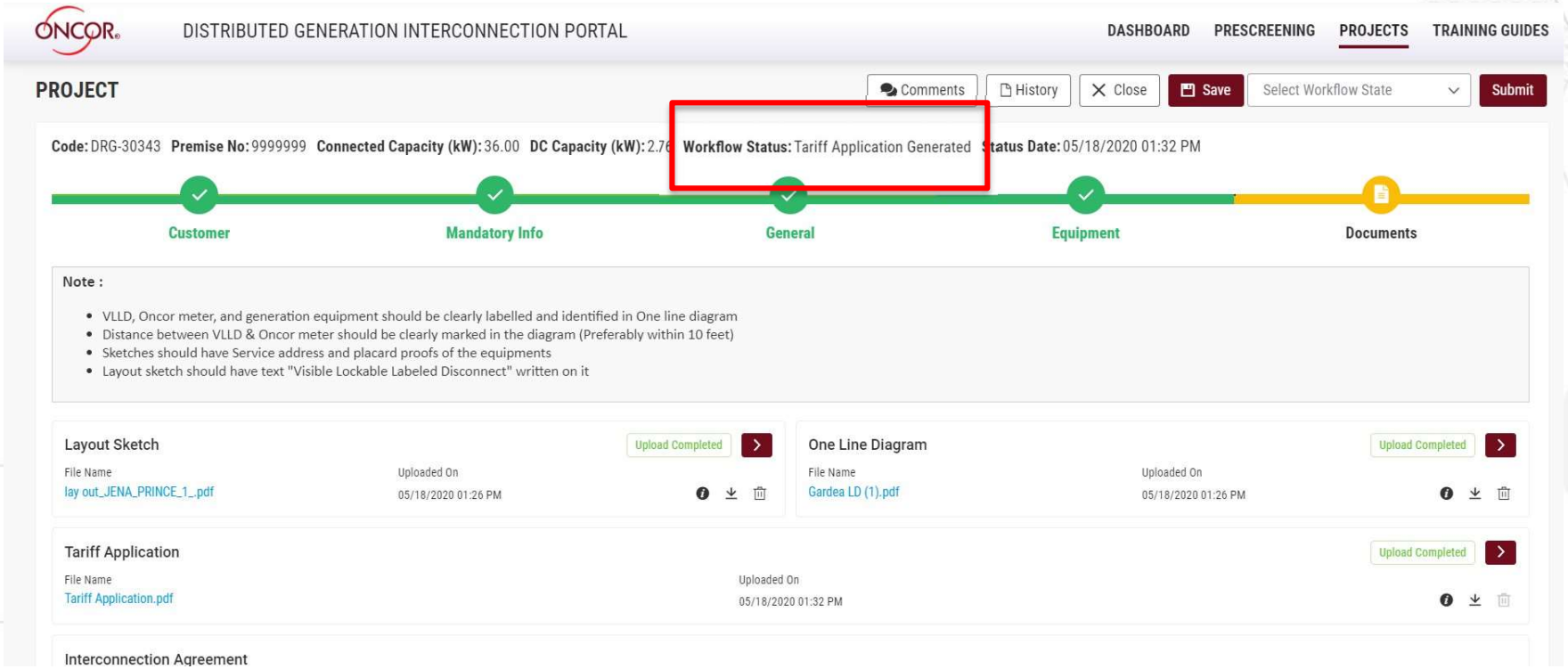
7.3.2 Duplicate Approval



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

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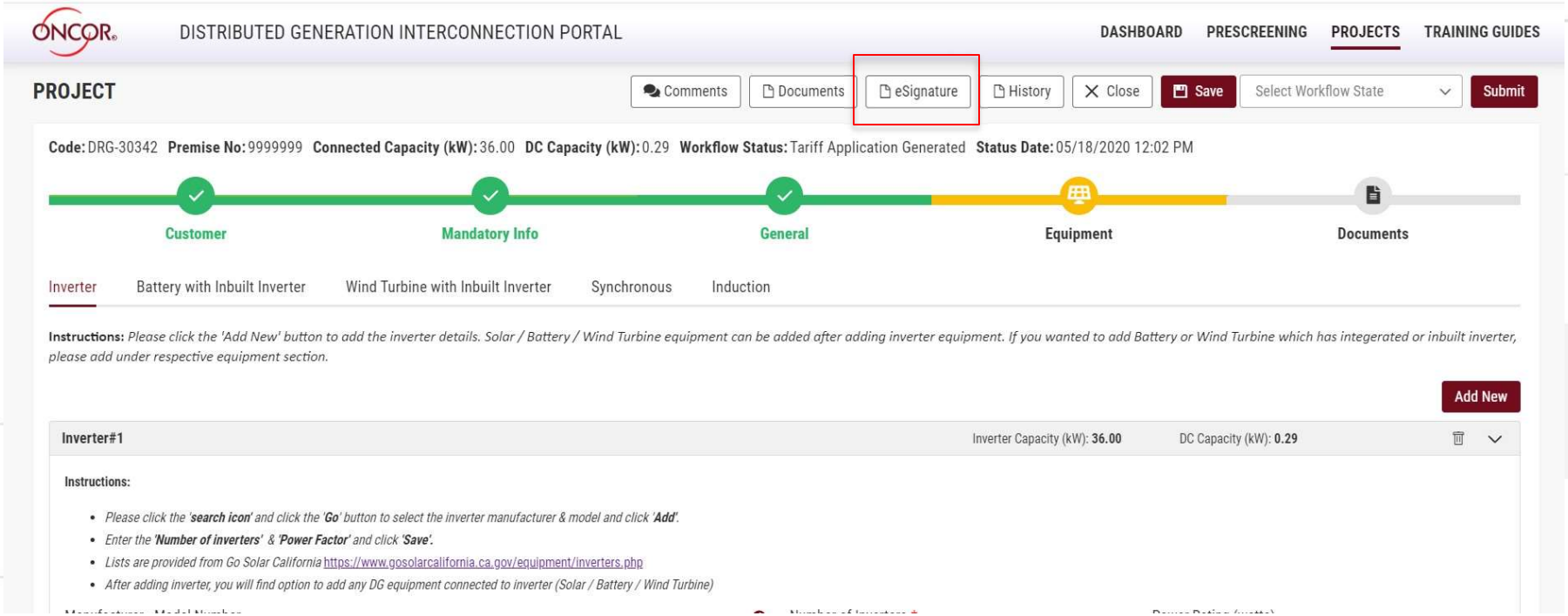
7.4 eSignature Tab



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

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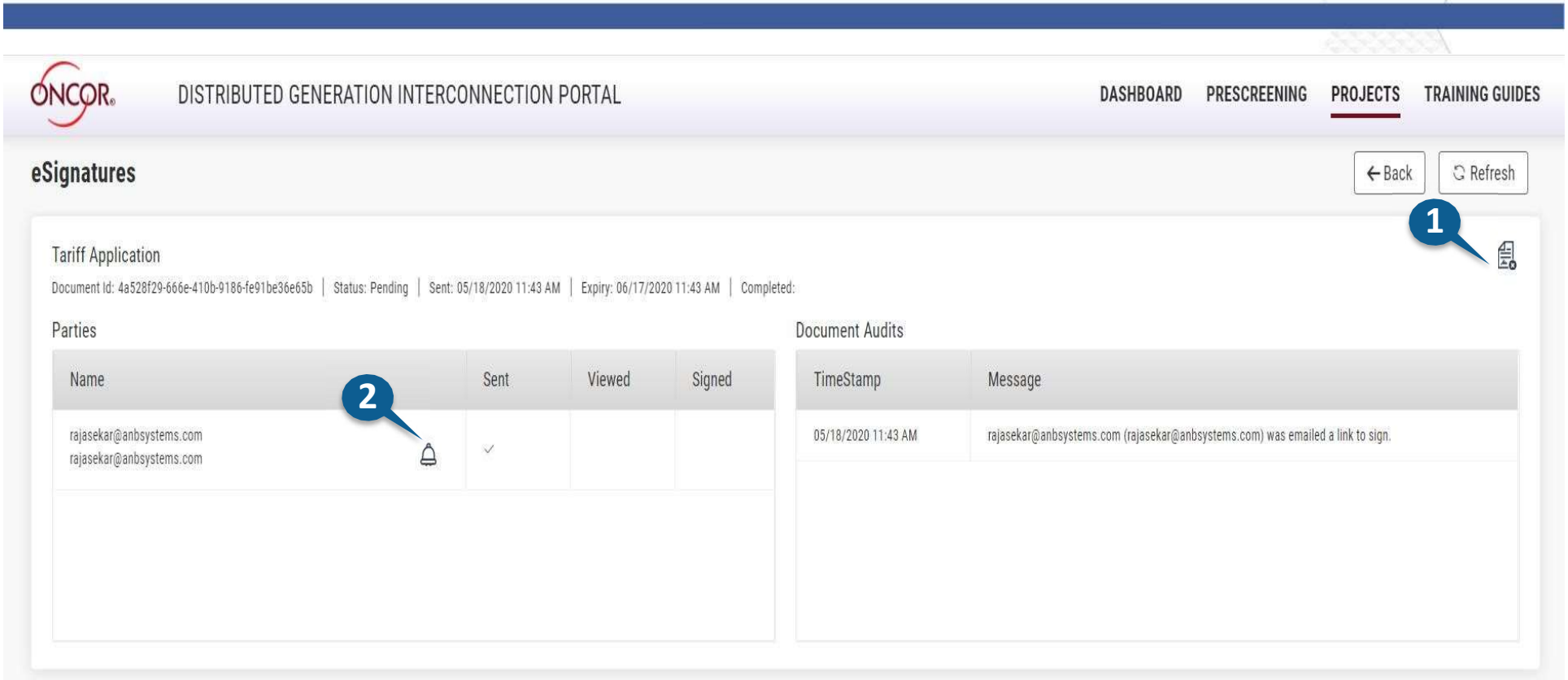
7.4.1 eSignature Tab



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

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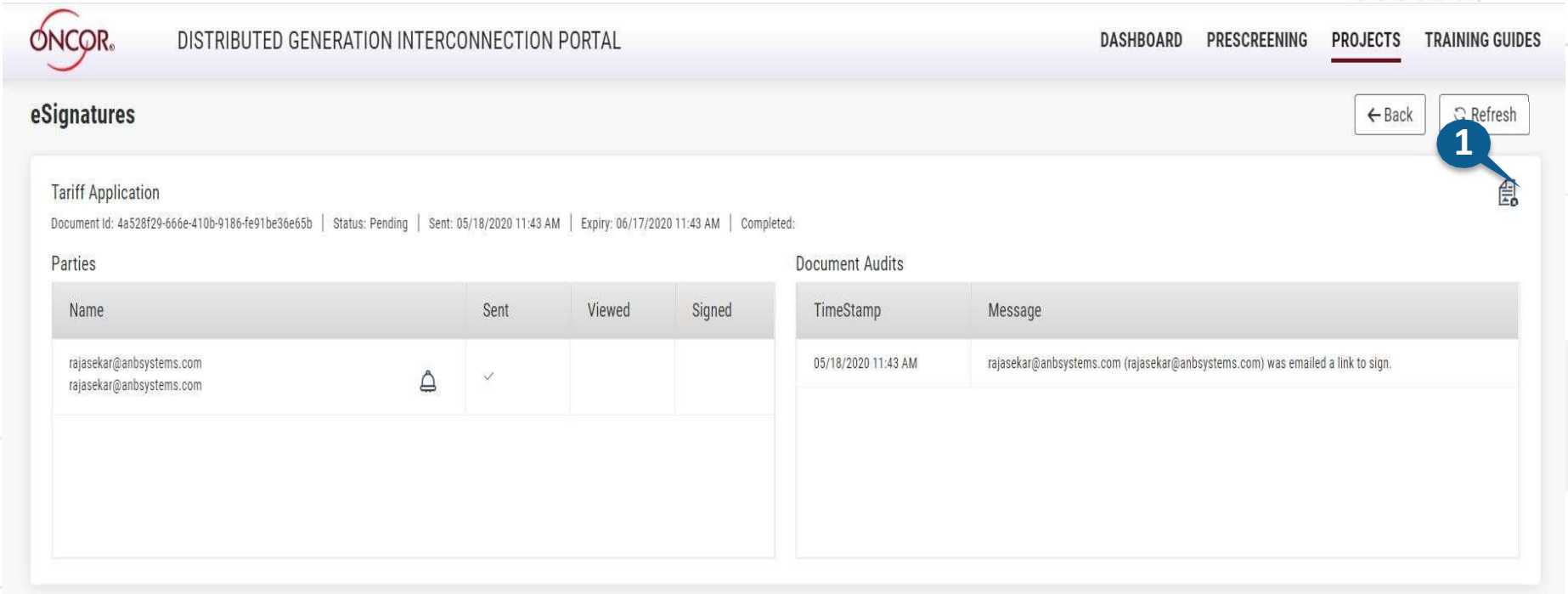
7.4.2 eSignature Tab – how Void Option works



- 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

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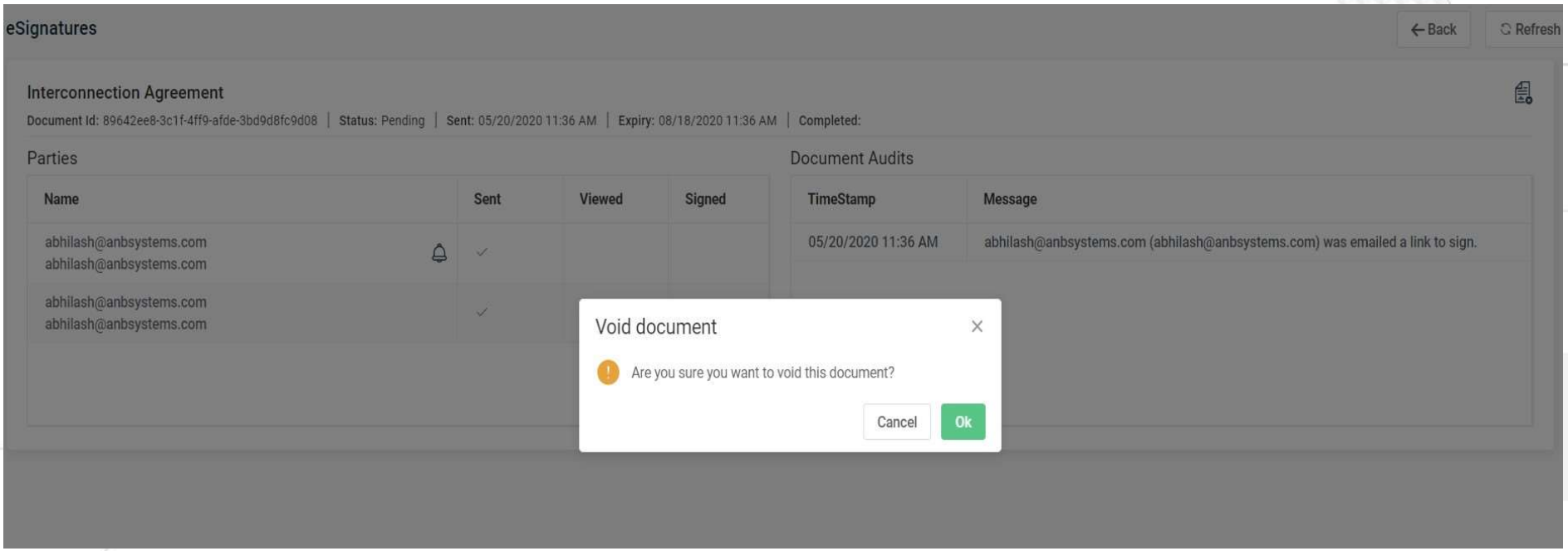
7.4.3 eSignature Tab – Void Option Contd.



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'

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8. EQUIPMENT LIST – INVERTERS & SOLAR PV

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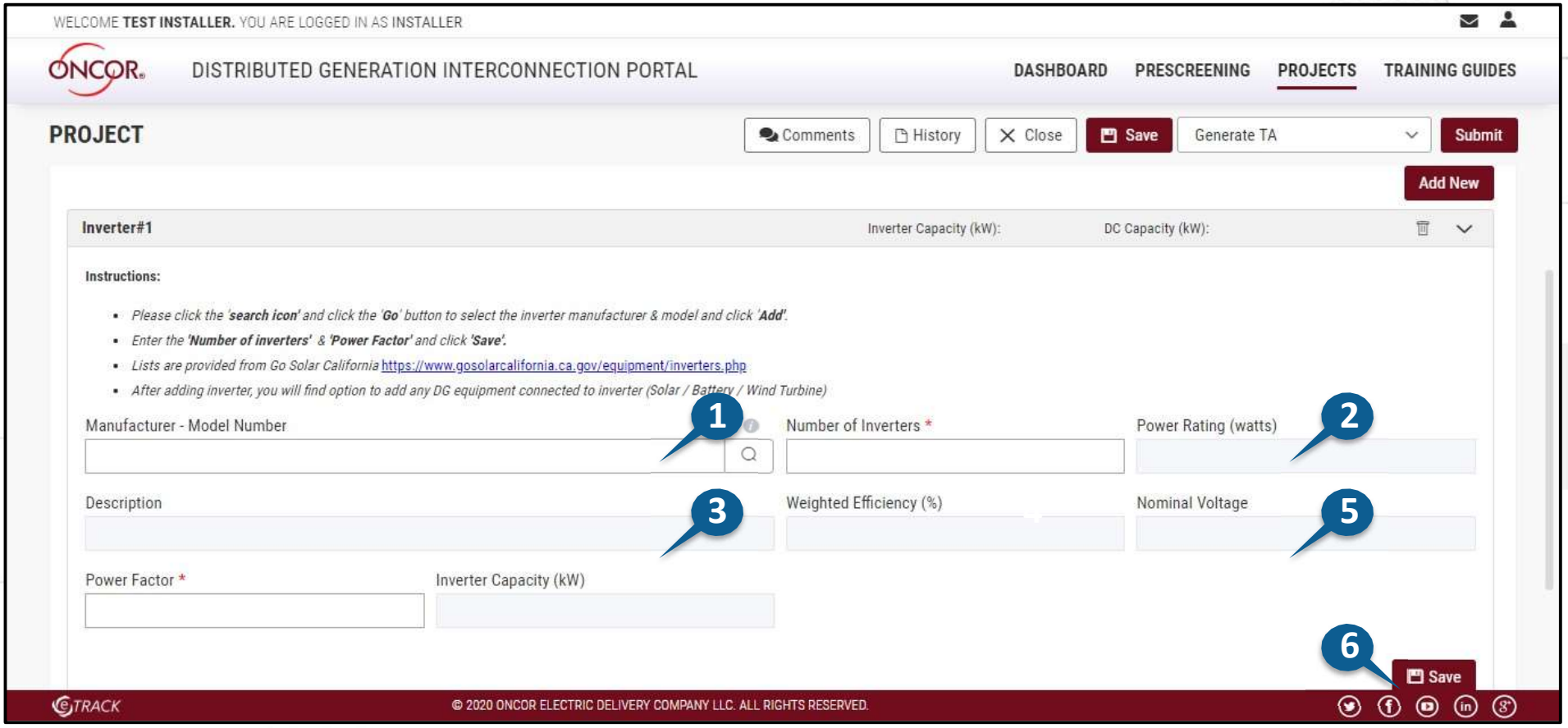
8.1 Equipment List - Inverter



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

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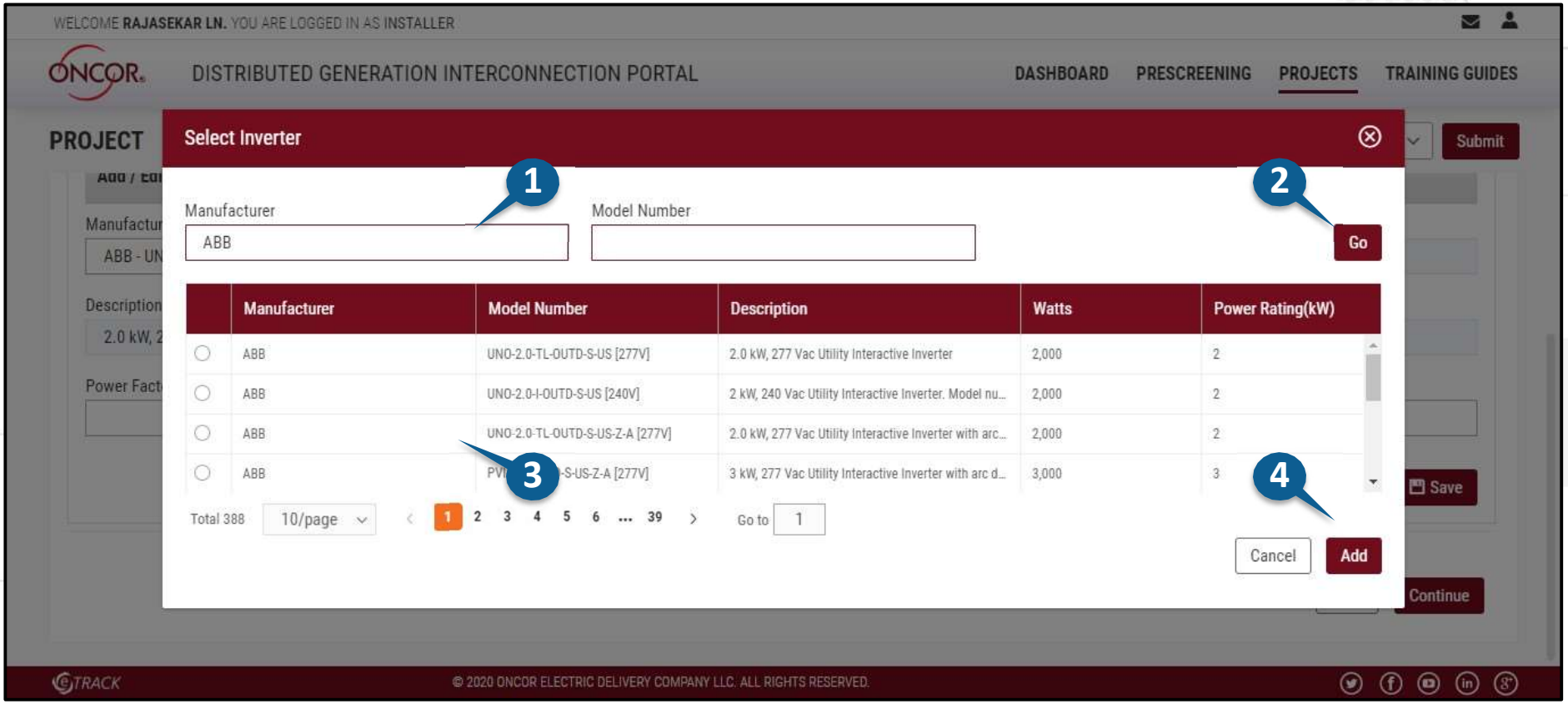
8.1.1 Equipment List - Inverter



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

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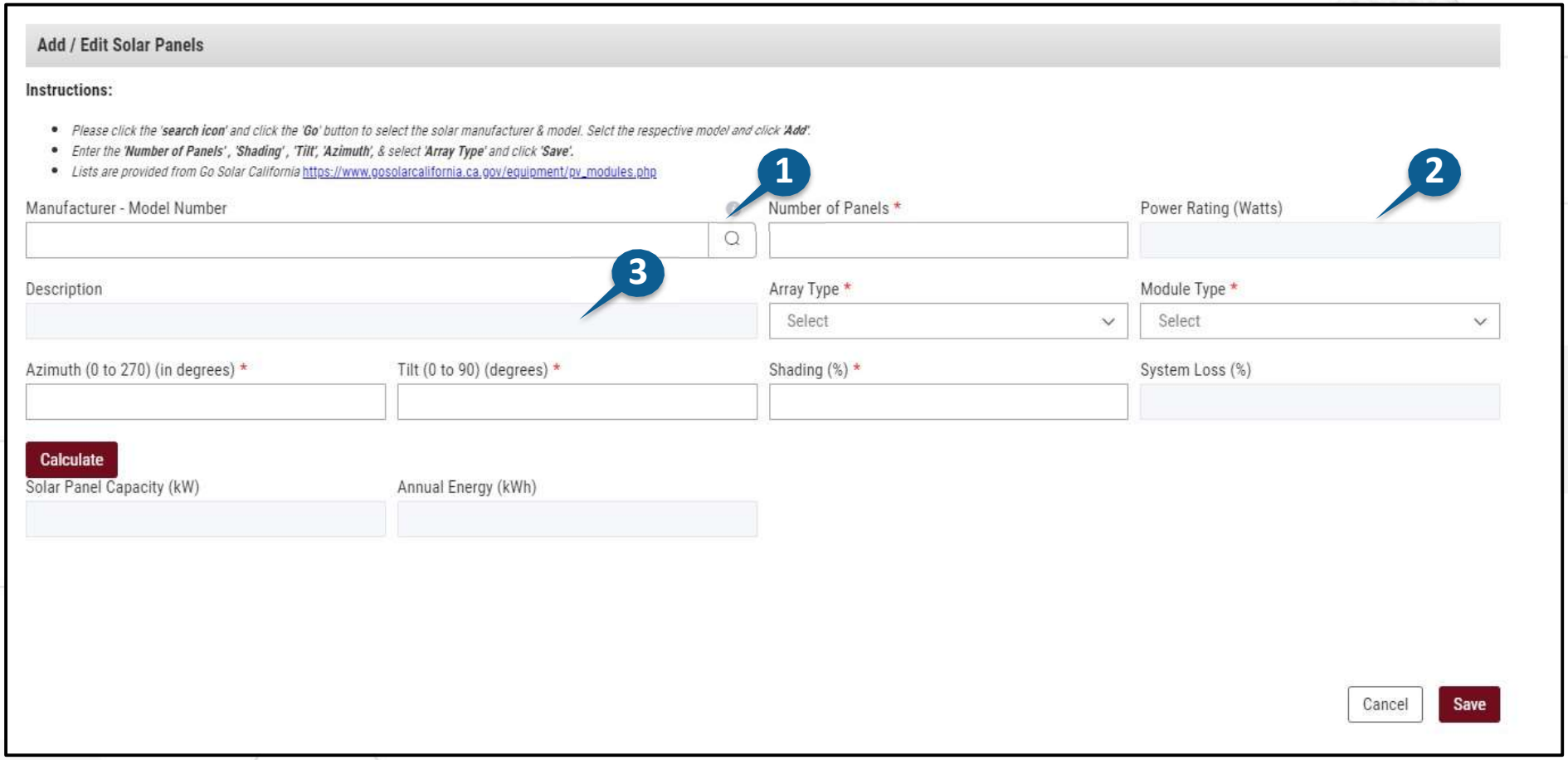
8.2 Equipment List - Solar PV



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

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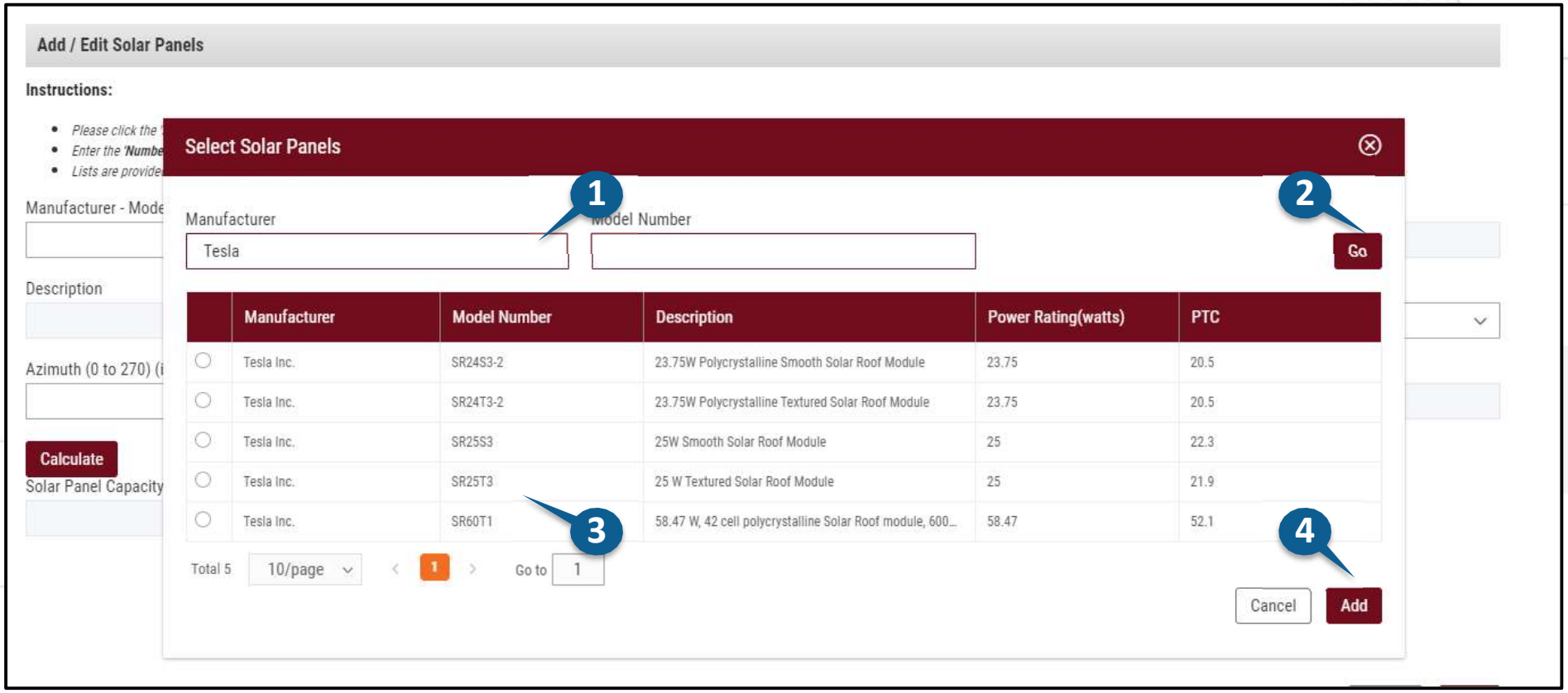
8.2.1 Equipment List – Solar PV



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

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THANK YOU!

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