

Beacon microFIT Supplier

Digital User Guide Registration, Overview and Account Maintenance



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Getting Started

Disclaimer

This document shall be used for guidance purposes only and does not amend the microFIT Contract or microFIT Rules under any circumstances. In the event of a discrepancy between this guidance document and the microFIT Contract or microFIT Rules, the microFIT Contract or microFIT Rules, as applicable, will prevail. Nothing in this document shall be binding on the IESO.

What is Beacon?

Beacon is a new tool that the IESO introduced in 2019 that enables you to manage all of your active microFIT Contracts online. Beacon consolidates all microFIT Contract information into one place and integrates the Contract management functions of the microFIT program, creating a single comprehensive and secure system that allows for accurate and efficient data management.

Beacon is used to view information, manage contractual obligations, and send and receive notifications for existing microFIT Contracts.

microFIT Program Roles

Beacon allows for the following microFIT Program Roles for the purpose of managing the microFIT contract as described below.

Beacon Program Role	Roles Description
Supplier Approver	The Supplier Approver is the microFIT Contract counterparty or an individual who has the authority to act on the behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to "you" and "your" throughout this user guide are references to a Supplier Approver.
	Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.
Supplier Agent	The Supplier Agent is an optional role assigned by the Supplier Approver in relation to a microFIT Contract. When assigned to a microFIT Contract, a Supplier Agent can view the microFIT Contract and related information and prepare certain types of requests for review and approval by a Supplier Approver.
	A Supplier Agent's actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.

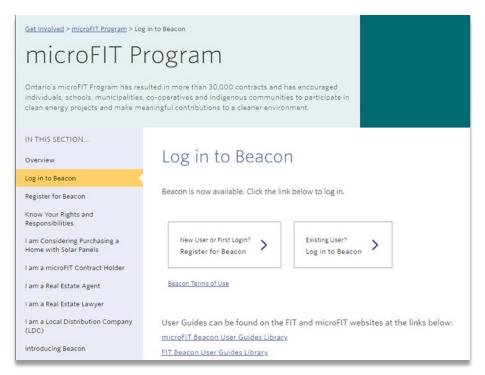
Role	Description
IESO	The IESO is represented by the Contract Management team that reviews, approves and/or rejects requests submitted by the Supplier Approver to the IESO. The IESO can also initiate certain requests that are to be reviewed by the Supplier Approver.

Registering Your Login

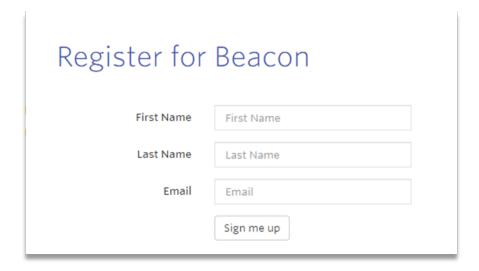
To access Beacon, you must first register your login. You will then be able to access programs offered by the IESO through a secured, cloud-based platform.

Procedure

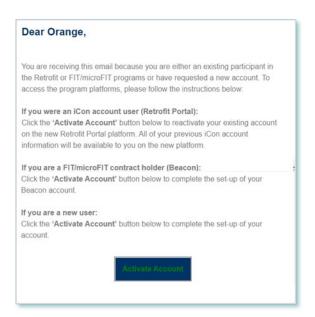
- 1. Go to http://www.ieso.ca/Get-Involved/microfit/login.
- 2. Select **Register for Beacon**. This brings you to the **Registration** page.



- 3. Enter your first name, last name and email address.
- 4. Select **Sign me up**.



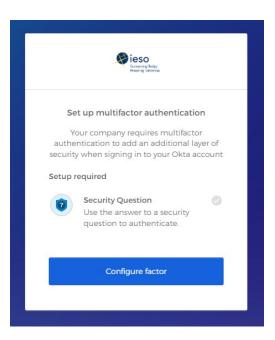
5. You will receive an account activation email shortly. Open the activation email, and then select **Activate Account**. This brings you to the registration window.



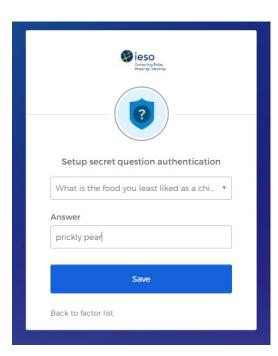
6. Enter a password.



7. Configure your Multi-Factor Authentication (MFA) options, starting with your Security Question. Select "Configure factor" to begin.

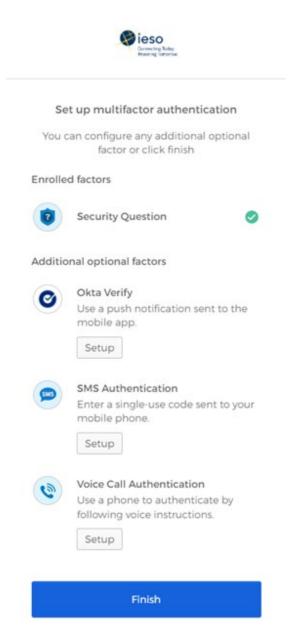


8. Select a Security Question from the drop down menu and input an answer. **Please note that your answer is case sensitive.** In the future when you log in to Beacon, or if you need to reset your password, you may be asked to provide the answer to this question.



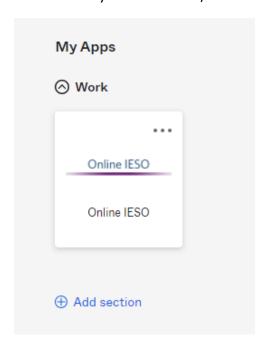
9. Next, you have the option to configure additional factors. Please be aware that the configuration of additional factors is not required. In order to do so, select "Setup" under the desired factor and follow the prompts.

If you wish to configure an additional factor, the IESO recommends that you select SMS Authentication or Voice Call Authentication. **The IESO does not recommend that users configure the Okta Verify option as it requires downloading a second application and is more complicated to set up and use**.



10. Once you have configured your desired factors, click on the "Finish" button in order to be directed into your My Apps Dashboard.

11. On your dashboard, select the tile that says "Online IESO".



12. Next you will be brought to the Available Programs dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.

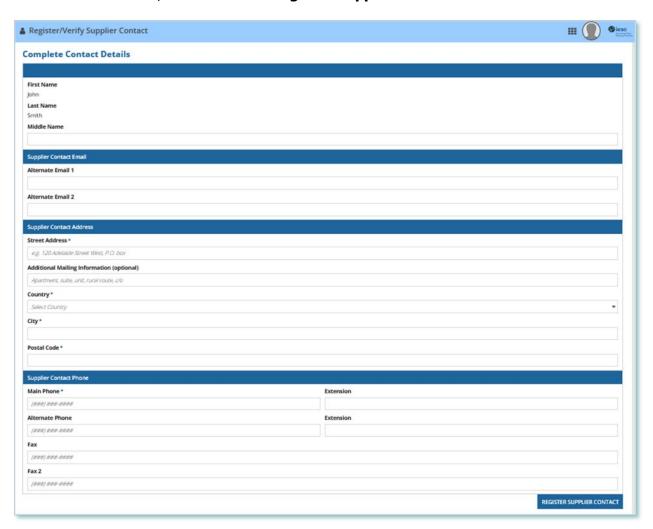
Welcome to the IESO Programs dashboard. Please select the program you wish to participate in below to proceed to the appropriate site.



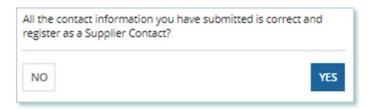


13. If you are a current contact on a microFIT contract accessing Beacon for the first time, you will be prompted to begin your Verification Tasks. Please refer to the **Verification Tasks** user guide for further instructions on completing those tasks.

14. If you are a new user, this brings you to the Complete Contact Details page. Enter your contact details, and then select **Register Supplier Contact**.



15. A dialog box is opened, select **Yes**. This brings you to the Registration Confirmation page.



16. Select Open Supplier Registration page. You now have access to Beacon.

SAVE DRAFT

Registration Confirmation

Your Contact registration is complete. To proceed with Supplier Registration please click the link below Open Supplier Registration page

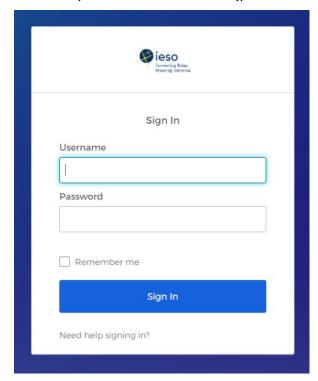
Beacon Overview

Sign in to Beacon

To begin managing your microFIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.

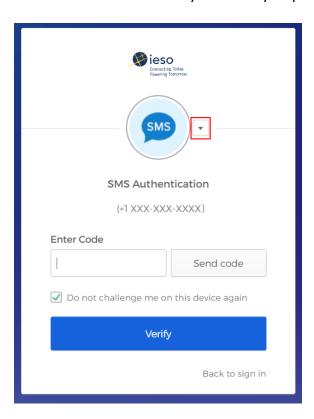
Procedure

- 1. Go to http://www.ieso.ca/Get-Involved/microfit/login.
- 2. Enter your account username (your email address) and password.

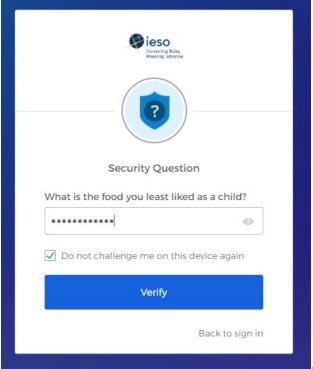


3. Select Sign In.

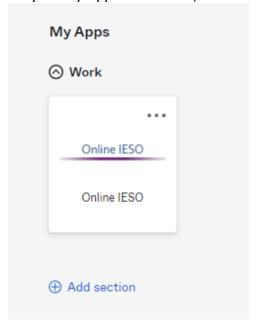
4. If you have set up multiple factors, you can choose which factor you will verify to login. Switch between factors by selecting the drop-down menu arrow next to the authentication icon. Please be aware that you are only required to verify one factor to login.



5. Once you have selected your factor, you will be prompted to provide the answer to your Security Question or your SMS/Voice Call Code. Type in the answer or code and click "Verify". Please be aware that the answer is case sensitive.



6. On your My Apps Dashboard, select the tile that says "Online IESO"

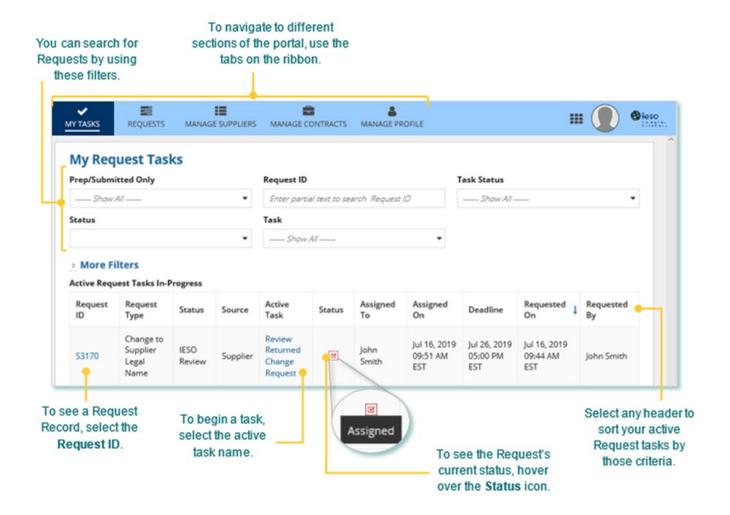


7. Next you will be brought to the Available Programs Dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.



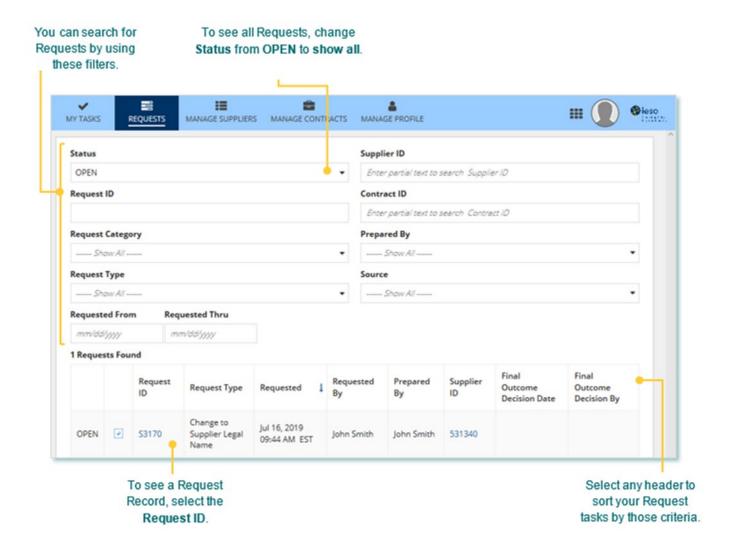
My Tasks Page

When you sign in and select the Beacon program from your dashboard, you arrive at the **My Tasks** page. Here, you'll see any active Request tasks that are assigned to you and your saved Request drafts.



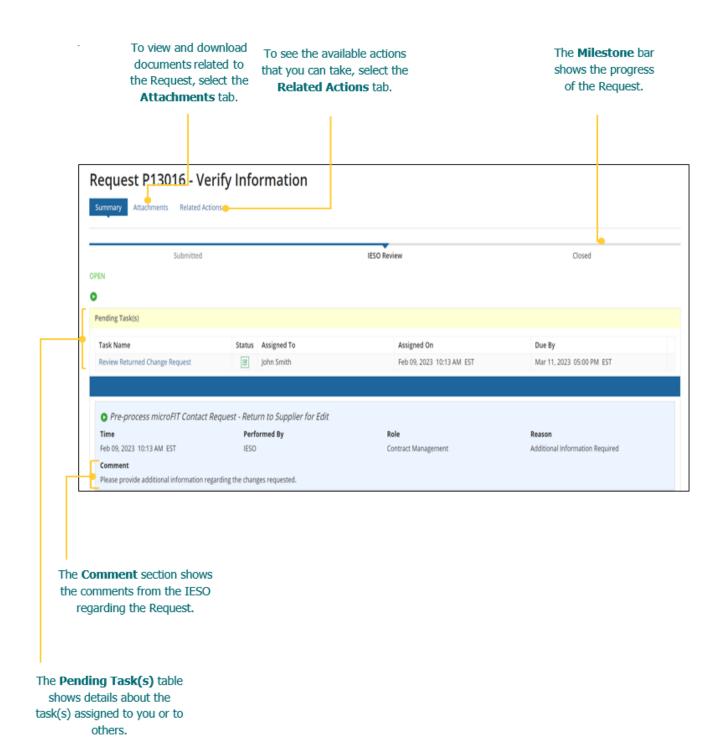
Requests Page

On the **Requests** page you'll see the active and closed Requests that are related to you, your Suppliers, or your Contracts.

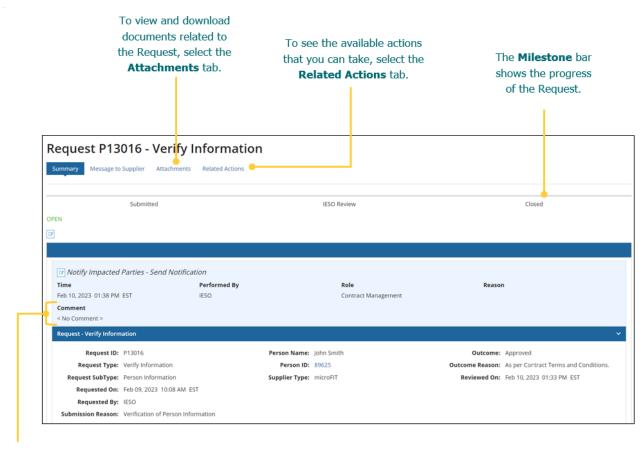


Request Record Overview

When you select a **Request ID**, this brings you to the Request Record's **Summary** page. The following figure shows the Record for an active Request:

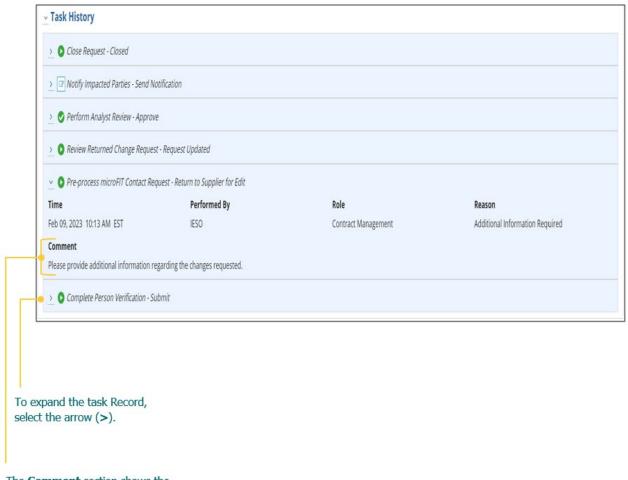


The following figure shows the Record for a closed Request:



The **Comment** section shows the comments from the IESO regarding the Request.

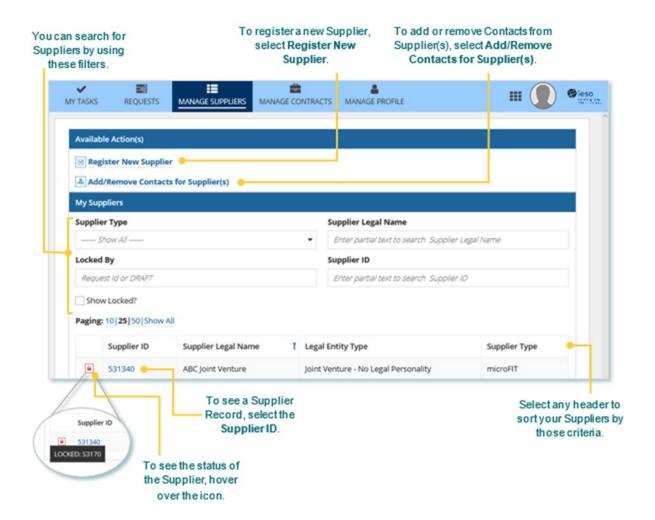
You can also view the **Task History** in the **Summary** page of a Request Record. All of the tasks created and completed for the Record are listed here.



The **Comment** section shows the comments from the IESO regarding the Request.

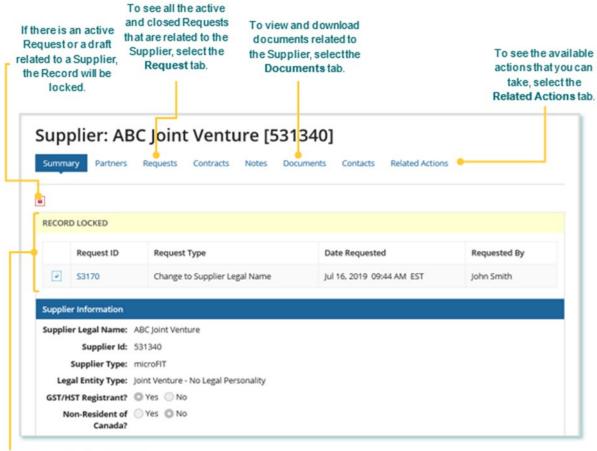
Manage Suppliers Page

On the Manage Suppliers page you'll see all of your Suppliers.



Supplier Record Overview

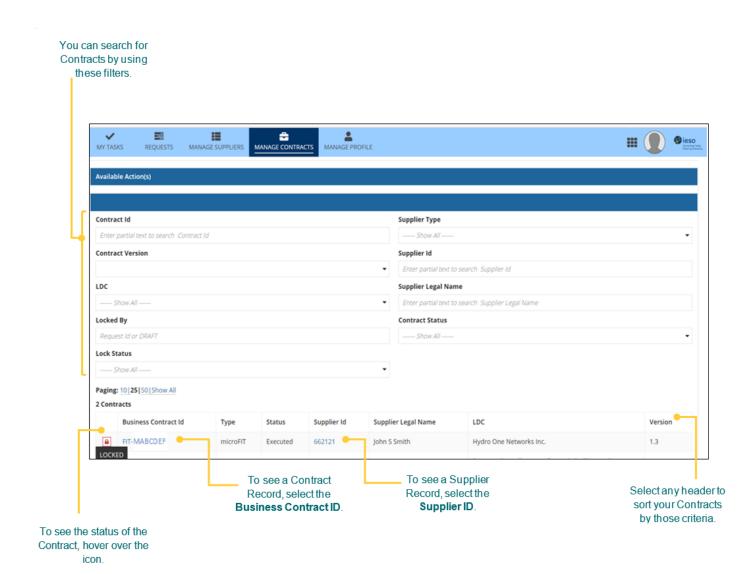
When you select a Supplier ID, this brings you to the Supplier Record's Summary page.



The Record Locked table shows information about the Request that is locking the Supplier. For more details, select the Request ID.

Manage Contracts Page

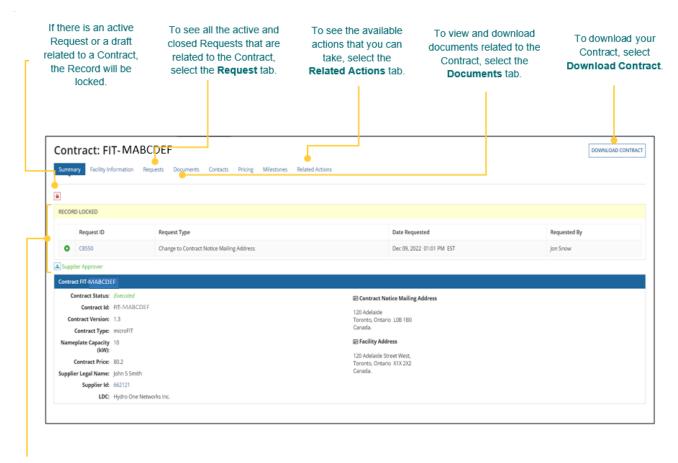
On the Manage Contracts page you'll see all of your Contracts.



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Contract Record Overview

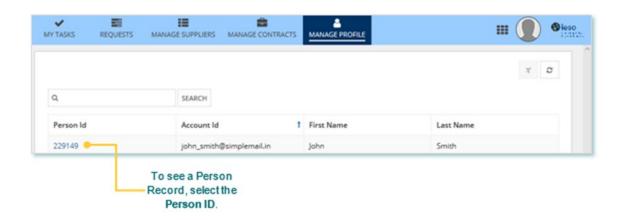
When you select a **Business Contract ID**, this brings you to the Contract Record's **Summary** page.



The **Record Locked** table shows information about the Request that is locking the Contract. For more details, select the **Request ID**.

Manage Profile Page

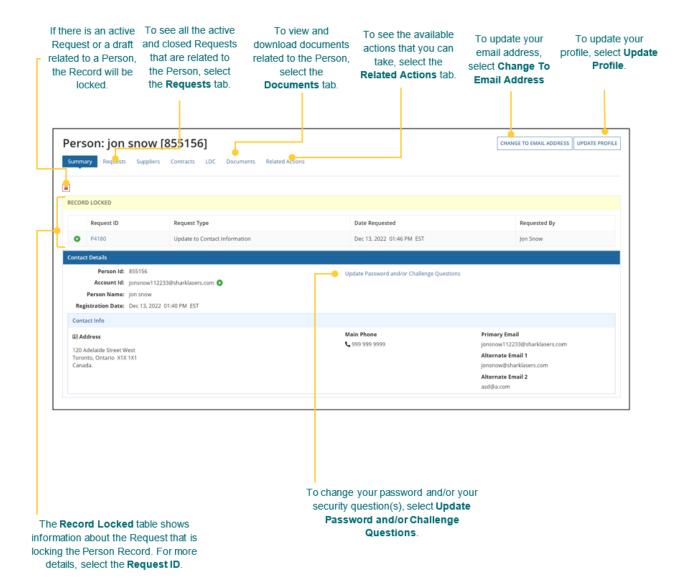
On the **Manage Profile** page you'll see your basic account profile information.



Person Record Overview

An individual user's detailed profile information is contained on the Person Record. The Person Record is linked to an account, which the individual user can access to manage all applicable Suppliers and Contracts.

When you select a **Person ID**, this brings you to the Person Record's **Summary** page.



Account Maintenance

Changing Your Contact Information

To update your contact information on your Person Record, you can submit an Update to Contact Information Request.

Once an Update to Contact Information Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete an Update to Contact Information Request in Beacon.

Procedure

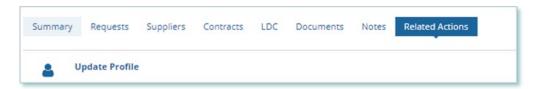
1. Select the Manage Profile tab.



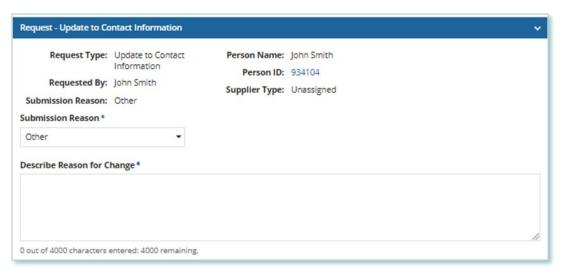
2. To view your account's Person Record, select your **Person ID**.



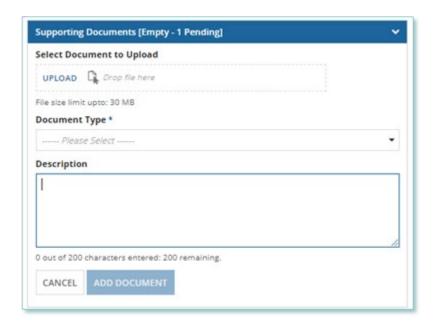
3. Select Related Actions > Update Profile.



4. On the **Contact Information** page, choose a submission reason, and then enter a description for your Request.



- 5. Make changes to your contact information, and then select **Next**.
- Optional: On the Upload Supporting Documents page, select the +UPLOAD NEW DOCUMENT icon. Attach a document, choose a document type, enter a description, and then select the ADD DOCUMENT icon.



Note: When you submit an Update to Contact Information Request, you might be required to submit certain documentation as evidence of certain information (e.g. marriage license, etc.).

7. On the **Review** page, look over all your changes, and then select **Submit Request**.

8. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.



Note: The Request now has a Request ID that you can use to track its progress.



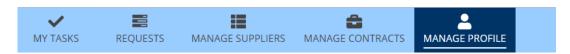
Changing Your Email Address

During the term of your microFIT Contract(s), there might be changes to the email address associated with the Person record.

The following instructions will guide you through how to change the email address associated with the Person record in Beacon.

Procedure

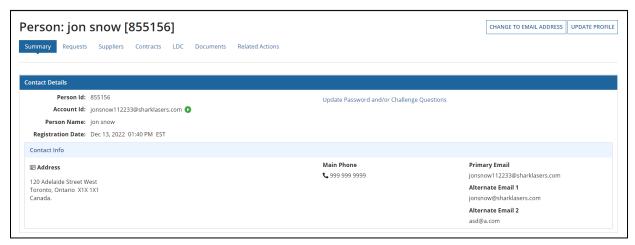
1. Select the MANAGE PROFILE tab.



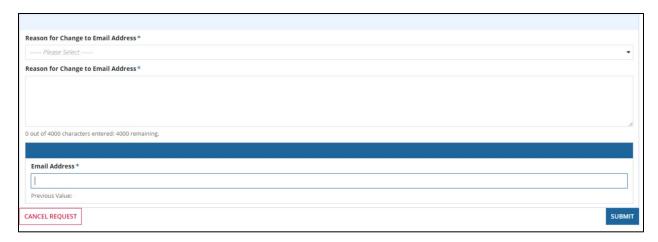
Select the Person Id.



3. Select **CHANGE TO EMAIL ADDRESS** on the top right corner.



- Under the Reason For Change Email To Email Address dropdown, select Email Address is outdated/inactive.
- Enter a description in the Reason for Change to Email Address.
- 6. Enter the new email address in the **Email Address** field.
- 7. Click **SUBMIT**



8. Once approved by the IESO, an email will be sent to the email address with instructions on how to log on using the new email address.

Changing Your Password

The following instructions will guide you through how to change your account password in Beacon.

Procedure

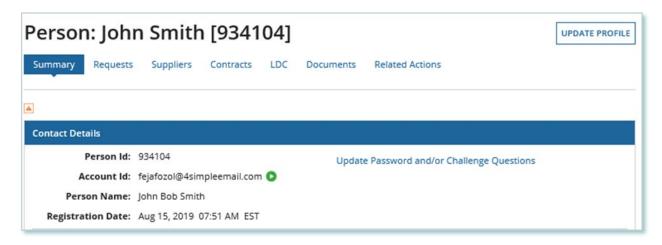
1. Select the **Manage Profile** tab.



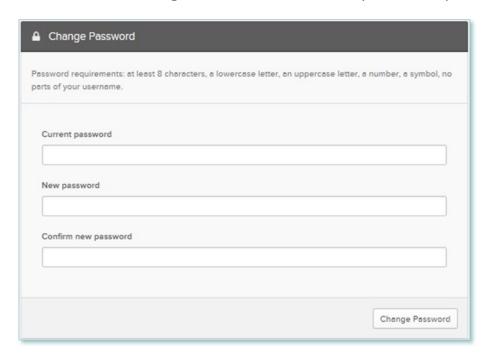
2. To view your account's Person Record, select your **Person ID**.



3. Select **Update Password and/or Challenge Questions**. Your Account page opens in a new tab.



4. Under the **Change Password** section, enter your current password and new password.



5. Select **Change Password**. Once your password has been successfully changed, a confirmation message is displayed.

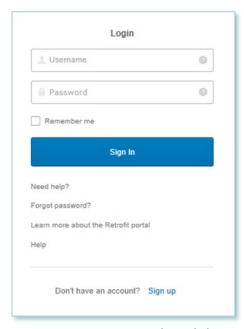


Resetting Your Password

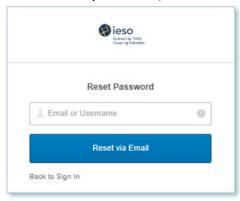
If you forgot your password, you can reset it on the Beacon sign in page.

Procedure

- 1. Go to http://www.ieso.ca/Get-Involved/microfit/login.
- 2. Select **Need help?** to show more options.
- 3. Select Forgot Password?



4. Enter your email, and then select **Reset via Email**.



5. Follow the instructions sent to your email to reset your password.

Updating your Challenge ("Forgot Password") Question

You can make changes to your challenge ("forgot password") question. If you forget your password, this question is used to verify you. The following instructions will guide you through how to update your account's challenge question in Beacon.

Procedure

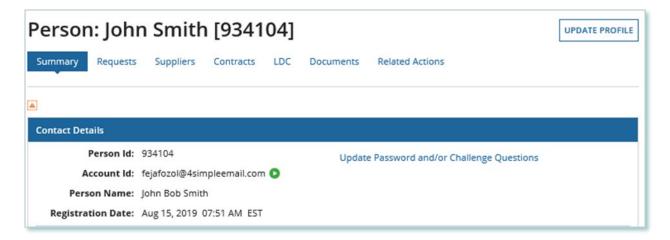
1. Select the **Manage Profile** tab.



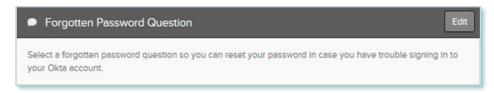
2. To view your account's Person Record, select your **Person ID**.



Select Update Password and/or Challenge Questions. Your Account page opens in a new tab.



4. From the Forgotten Password Question section, select Edit.



5. Choose a new question and enter the answer to the question. Select **Save**. Your question has been updated. If you forget your password, this question will be used to verify you.



Additional Resources

Additional resources can be found at the following links:

microFIT Homepage: http://www.ieso.ca/Get-Involved/microfit/news-overview

Independent Electricity System Operator 1600-120 Adelaide Street West Toronto, Ontario M5H 1T1 E-mail: microFIT.contract@ieso.ca ieso.ca @IESO Tweets f facebook.com/OntarioIESO in linkedin.com/company/IESO

