

Customer Project Portal Guide

Date: June 25, 2026

Version: 1.0

Classification: Public

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1. Purpose

This document provides an overview of the Customer Project Portal (CPP), a centralized solution that supports improved project collaboration and information management between the AESO and Market Participants (MPs). The CPP consists of two integrated platforms: Adobe Workfront and the Customer Project Management SharePoint Online (CPM SPO) site. Together, these platforms reduce reliance on email-based document exchanges and support a more efficient and secure approach to information management throughout the project lifecycle.

This document applies to:

- AESO Project Managers and project support teams.
- Market Participants and their authorized representatives.
- Consultants, contractors, and other external stakeholders granted access to project information.
- Any individual responsible for creating, reviewing, sharing, approving, or managing project-related communications and documentation within the Customer Project Portal.

All project-related information managed within the Customer Project Portal shall comply with AESO information management, security, and access control requirements.

Additional guidance and information will be added to this document as required. Please contact customer.connections@aeso.ca with any questions.

2. General Information

The Customer Project Portal (CPP) is AESO's modernized platform for managing project-related communication, collaboration, and document management with Market Participants and other external stakeholders.

The CPP combines the capabilities of Adobe Workfront and SharePoint Online to provide an integrated and secure project management environment. Each platform serves a distinct purpose - Workfront provides project visibility, communication, and workflow management, while SharePoint Online supports document management and collaboration.

Adobe Workfront

Adobe Workfront is the primary access point and user interface for the Customer Project Portal. Through Workfront, users can:

- Submit project-related requests and intake forms.
- Access project communications and updates.
- View project dashboards, reports, and status information.
- Navigate to project documentation stored in SharePoint Online.
- Monitor project activities and assigned actions.

Customer Project Management SharePoint Online

CPM SPO is the official repository for project documentation. Through the site, authorized users can:

- Access project folders and documentation.
- Upload, review, and collaborate on project documents.
- Maintain version history and document tracking.
- Share information securely between AESO and external stakeholders.

3. How to access the Customer Project Portal

3.1 Requesting Access

To access the Customer Project Portal, please email customer.connections@aeso.ca to request for an account to be created.

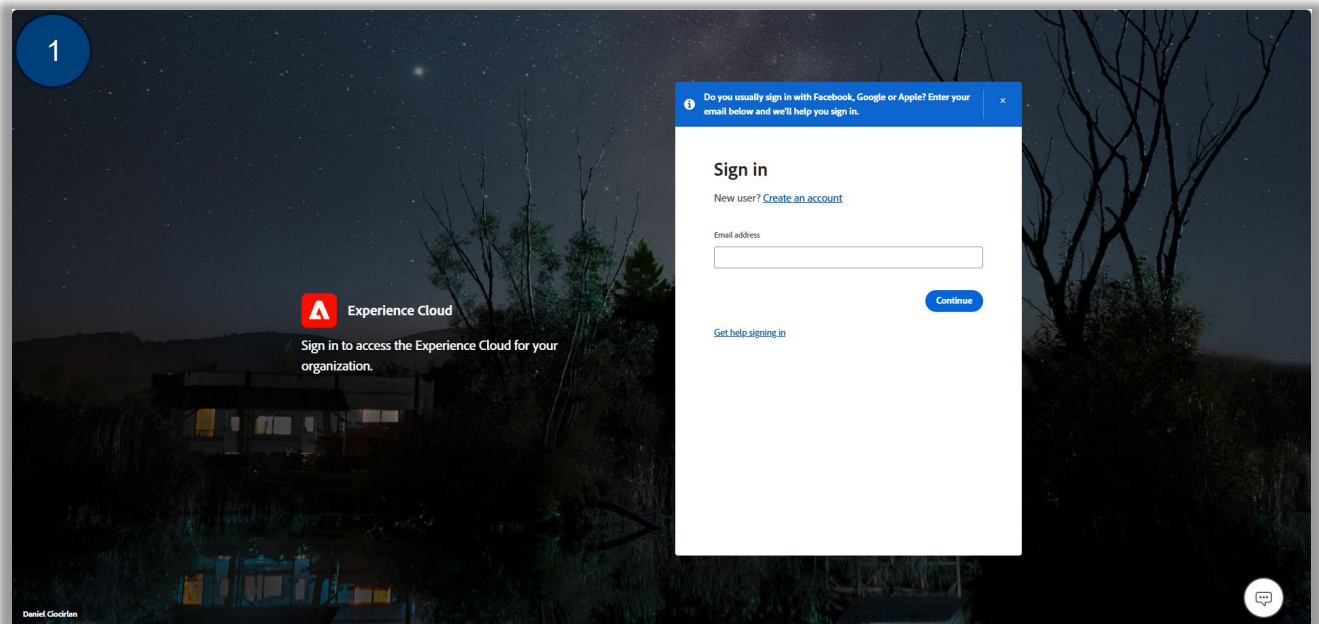
3.2 Log-in

Once the account has been created, access the following link:

<https://experience.adobe.com>

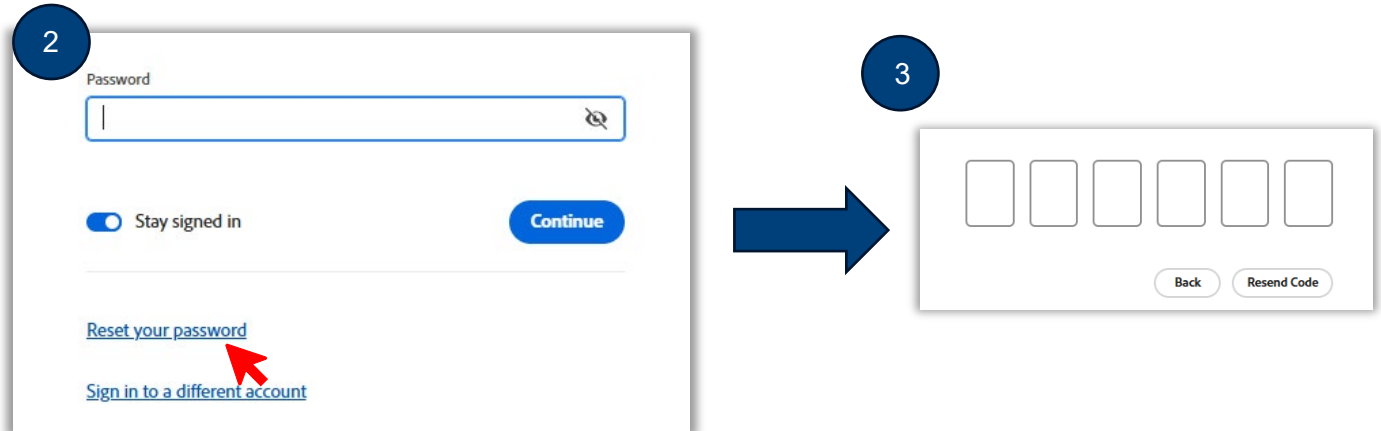
You will be directed to the Adobe Experience Cloud Home Page. Please follow the steps below to log in:

Enter your corporate email address in the designated field. **Note:** If you have Adobe SSO in your organization, you will be redirected to another page (e.g. Microsoft Credentials) after entering your corporate email in Step 1. In this case, log in with your corporate password through SSO to skip Steps 2 to 5.

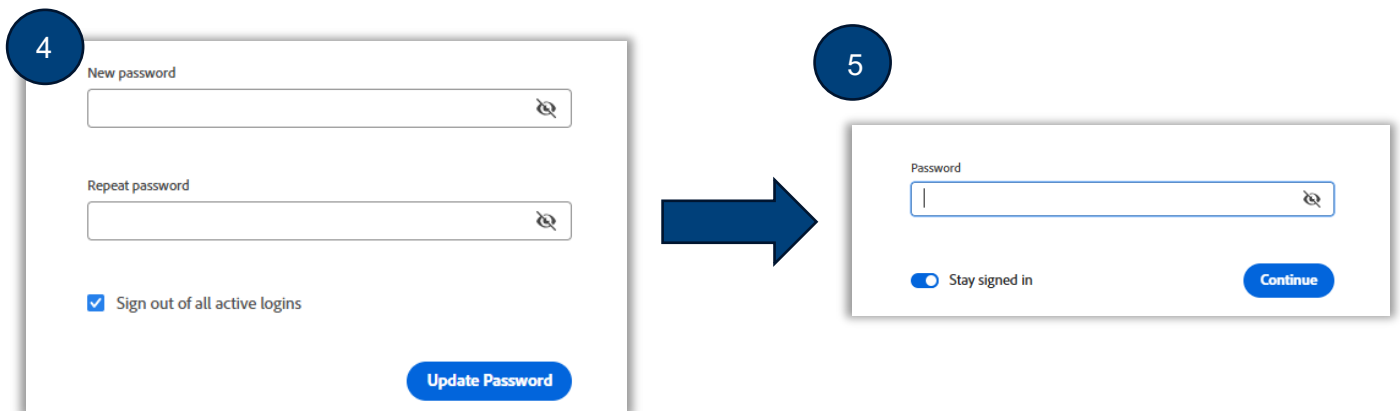


Click on “Reset your password”.

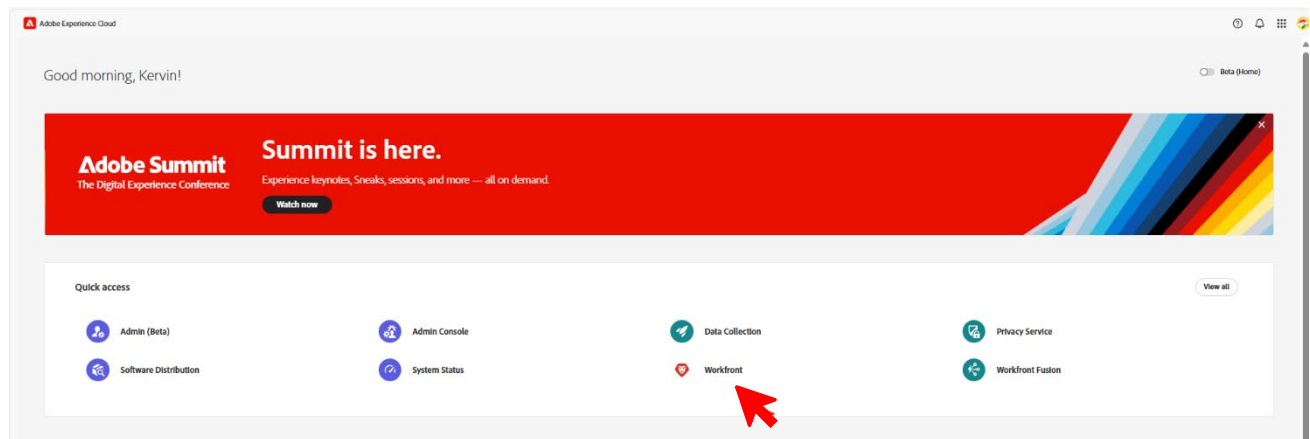
Enter the verification code that was sent to your email.



Register your new password by following the instructions.
 Log in to your account using your email and the new password.

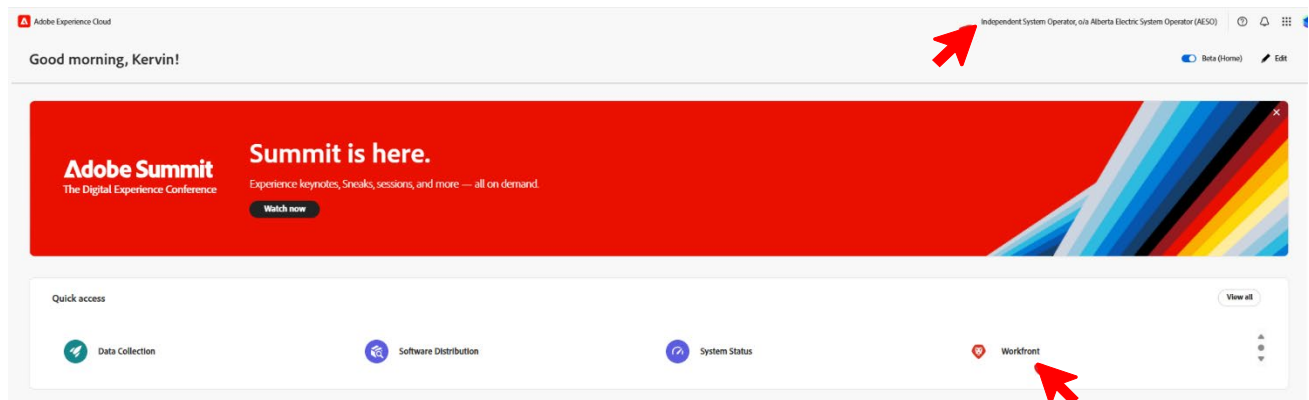


Once logged in, click on Workfront. This should appear on the list of Adobe products.



In **Step 6**, select **Independent System Operator** in the drop-down menu in the upper-right hand corner of the screen. Click on Workfront.

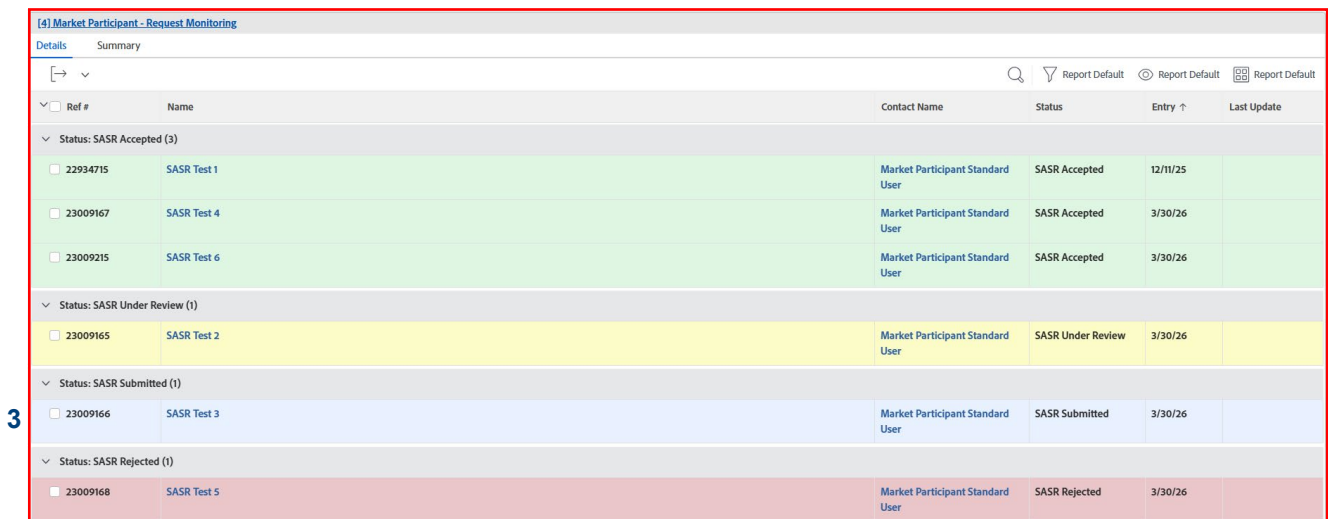
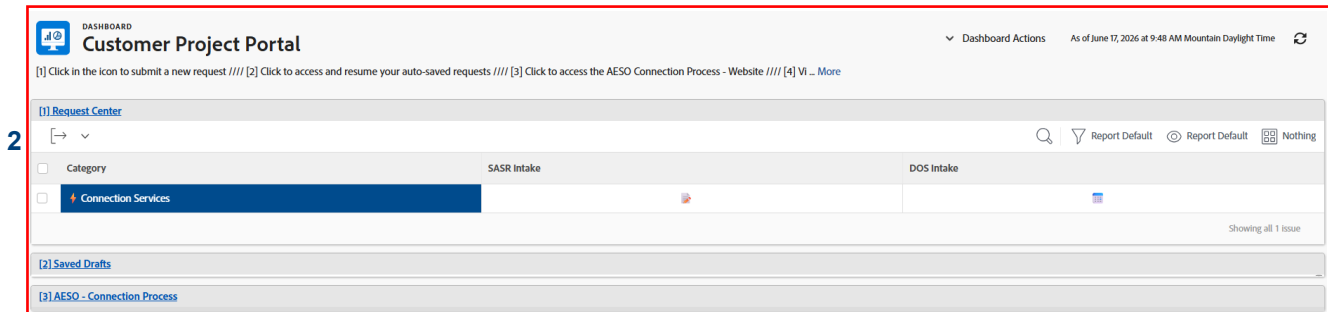
6

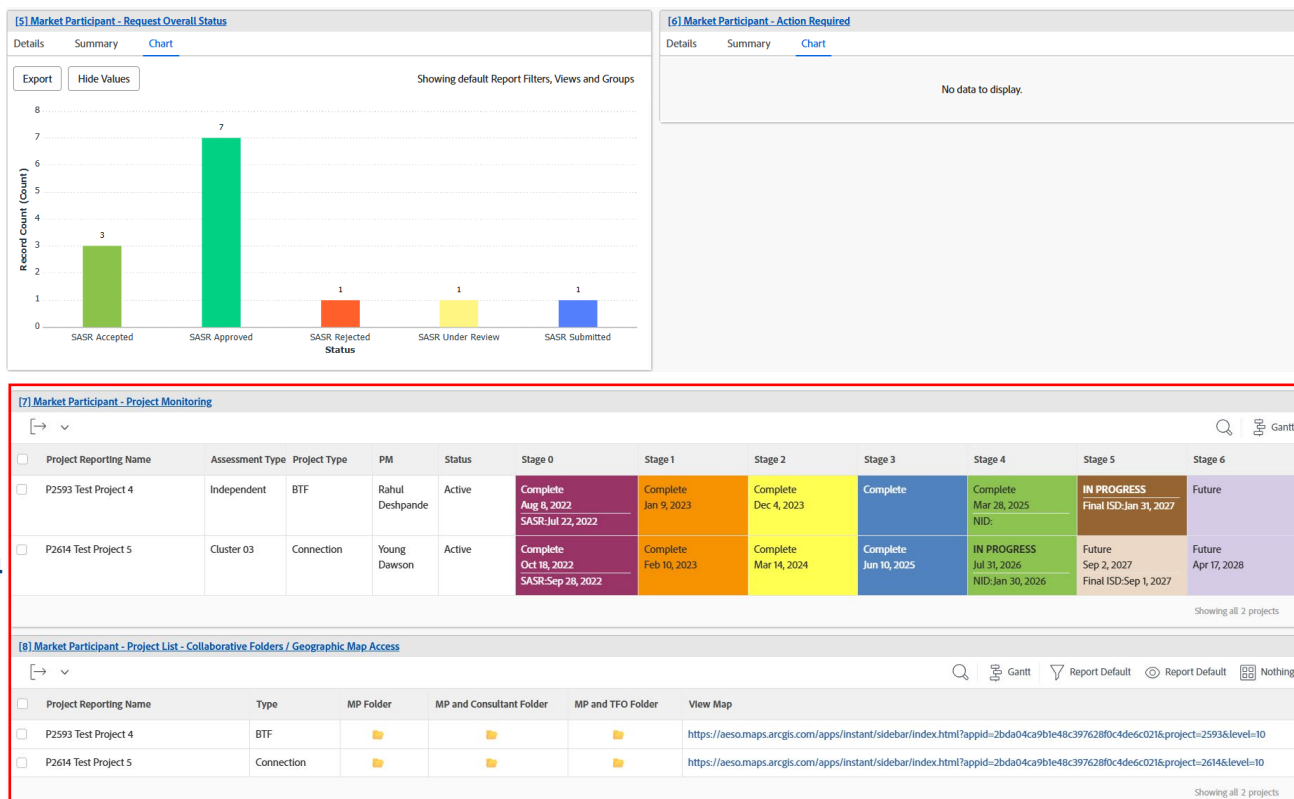


3.3 Customer Project Portal

3.3.1 Main Page Overview

After logging into your account with your new password, you will be directed to the Customer Project Portal (CPP).





The CPP dashboard is organized into four key areas as numbered above:

1. **Menu** – Important Icons
2. **Links** – Submit request, resume saved drafts, and access external resources.
3. **Request Monitoring** – Track the status of your submitted SASRs.
4. **Project Monitoring** – Monitor your active project engagements with AESO.

Each of these is described in greater detail below.

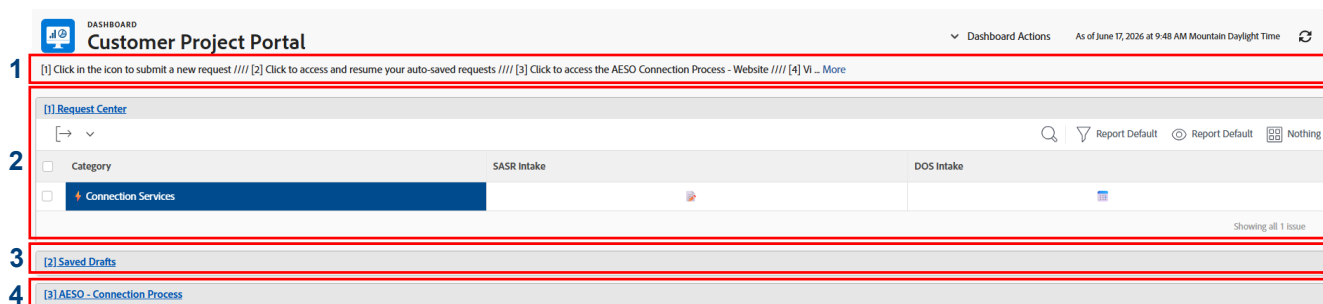
Menu

When you access the landing page, there are several icons displayed. The two most important icons are:

- **Customer Project Portal** – Located in the upper-right corner of the screen, this is a shortcut to return to the main dashboard at any time.
- **Notifications** – Located in the upper-left corner, this allows you to view all notifications regarding your requests, updates, or system messages.

Links

This section contains shortcuts to important internal and external pages to streamline navigation.

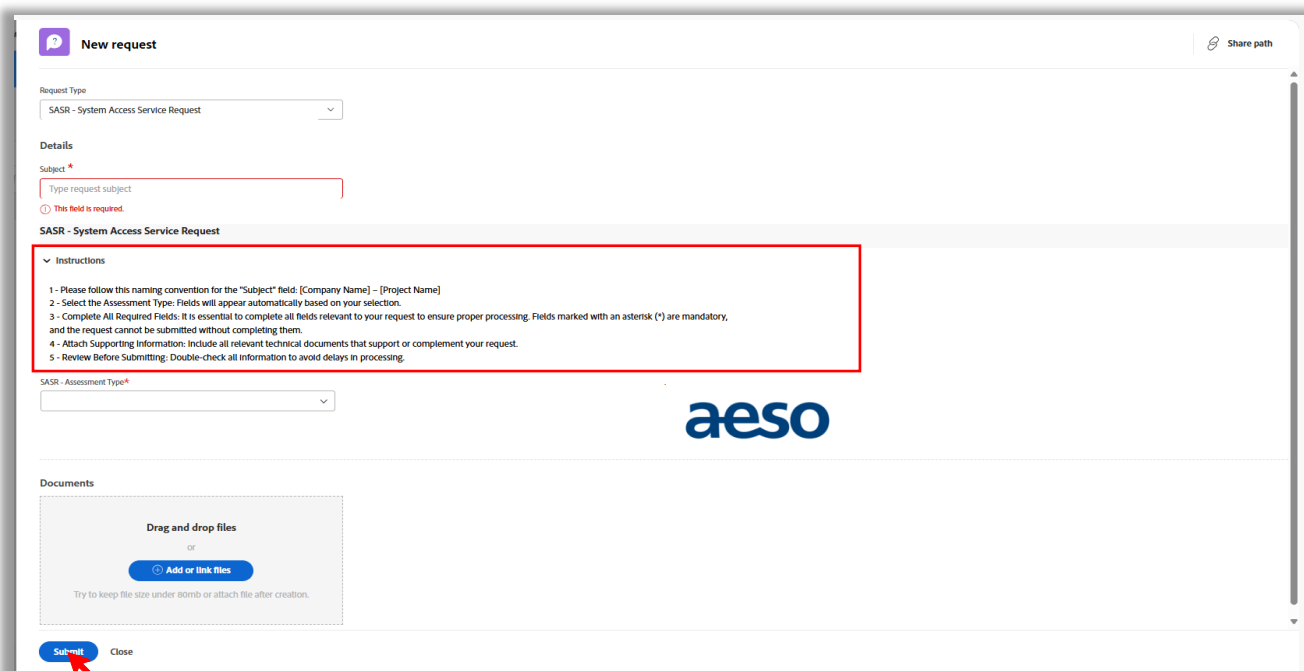


1. Instructions on using dashboard features.

This provides a brief overview of dashboard features. Click “More” to view the full details.

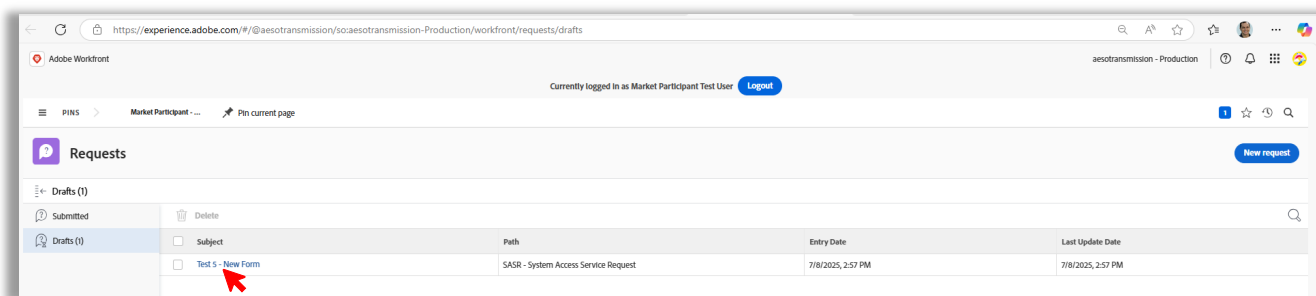
2. Request Center

Click on the icon in the table to start a new request. You will be directed to the request form page. Please follow the on-screen instructions carefully and complete all required fields before submitting your request.



3. Saved Drafts

Click a linked form to continue working on a previously saved request. Drafts can be identified by name or last modified date.

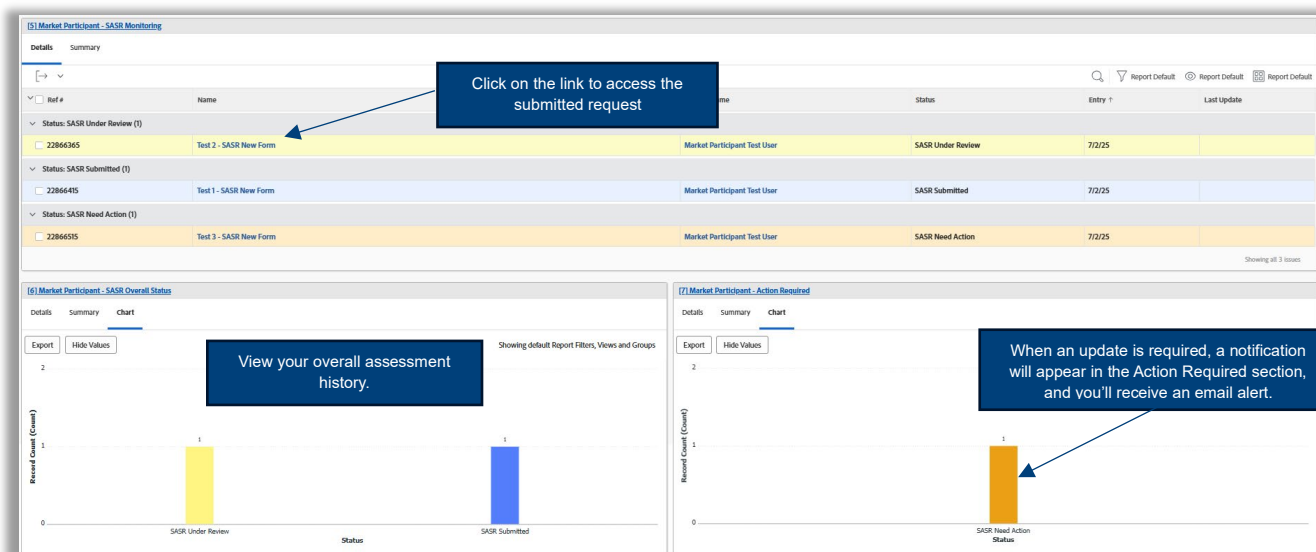


4. AESO – Connection Process

Click on the link to access the AESO website for detailed information about the AESO connection process.

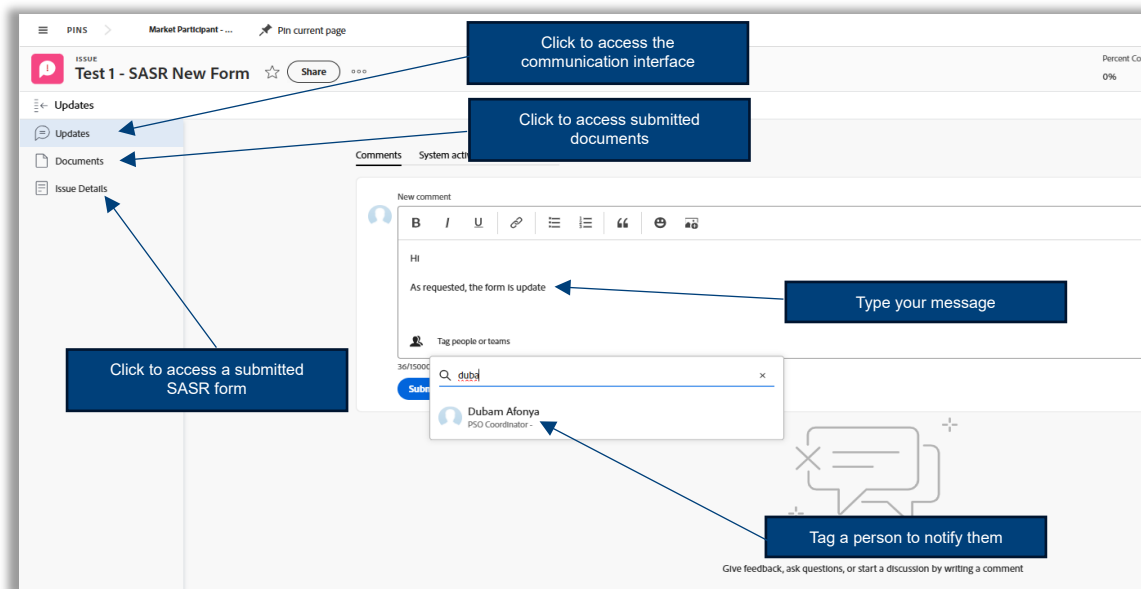
Request Monitoring

This section allows you to view and monitor your submitted requests. Access an assessment by clicking on the corresponding link and track its status in real time.



After clicking the link, you will be directed to the Assessment Page, where you can:

- Send messages directly to the AESO internal team.
- Receive communications or notifications from the AESO.
- Upload new documents or replace existing ones.
- Update a form if a revision is required.



Project Monitoring

A project becomes active when it completes Stage 0 of the AESO Connection Process.

This section allows you to view and monitor your active projects.

[7] Market Participant - Project Monitoring					Project Stages						
Project Reporting Name	Assessment Type	Project Type	PM	Status	Stage 0	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6
P2593 Test Project 4	Independent	BTF	Rahul Deshpande	Active	Complete Aug 6, 2022 SASR-Jul 22, 2022	Complete Jan 9, 2023	Complete Dec 4, 2023	Complete	Complete Mar 28, 2025 NID:	IN PROGRESS Final ISD-Jan 31, 2027	Future
P2614 Test Project 5	Cluster 03	Connection	Young Dawson	Active	Complete Oct 18, 2022 SASR-Sep 28, 2022	Complete Feb 10, 2023	Complete Mar 14, 2024	Complete Jun 10, 2025	IN PROGRESS Jul 31, 2026 NID:Jan 30, 2026	Future Sep 2, 2027 Final ISD-Sep 1, 2027	Future Apr 17, 2028

[8] Market Participant - Project List - Collaborative Folders / Geographic Map Access					View Map
Project Reporting Name	Type	MP Folder	MP and Consultant Folder	MP and TFO Folder	
P2593 Test Project 4	BTF	Folder	Folder	Folder	https://aesomaps.arcgis.com/apps/insant/sidebar/index.html?appid=2bda04ca9b1e48c397628f0c4de6c0216&project=2593&level=10
P2614 Test Project 5	Connection	Folder	Folder	Folder	https://aesomaps.arcgis.com/apps/insant/sidebar/index.html?appid=2bda04ca9b1e48c397628f0c4de6c0216&project=2614&level=10

• Active Project Monitoring

Projects are categorized into three process types. To determine which applies to your project, refer to the "Project Type" column. You can view the corresponding process description below to better understand each Stage in detail:

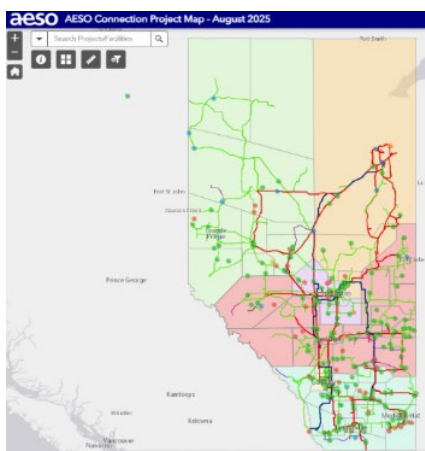
- [Connection Process](#)
- [Behind the Fence \(BTF\) Process](#)
- [Contract Process](#)

As the AESO Project Manager executes each task in the timeline, the MP will be able to see milestones and their respective planned completion dates.

There is also a link to access a geographic map showing the location of each project.

The AESO Connection Project Map is an online interactive tool that provides a visual, geographic representation of connection projects, overlaid with the AESO’s provincial Planning Areas and Regions.

For any questions regarding the use of this map, please contact customer.connections@aeso.ca

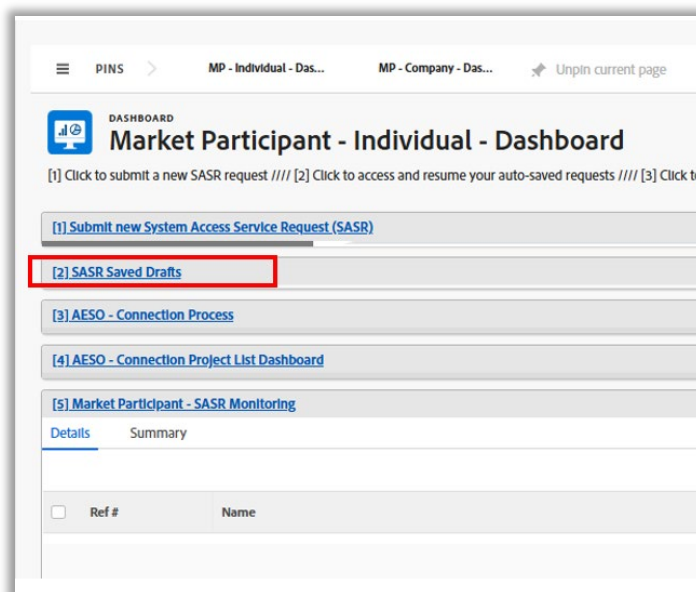


3.4 Additional Functions

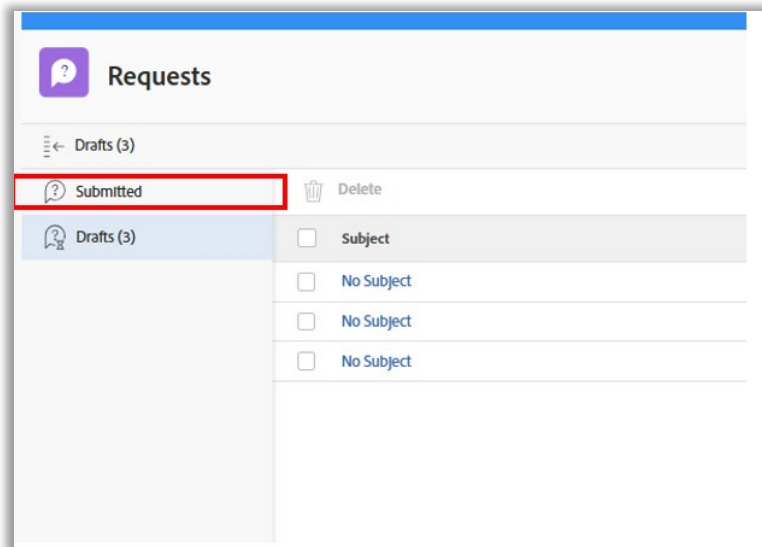
3.4.1 Create a New Submission from an Existing Request

Workfront provides the ability to duplicate an existing submission, which can save time when most of the information is the same or similar. To duplicate a submission, follow the steps below.

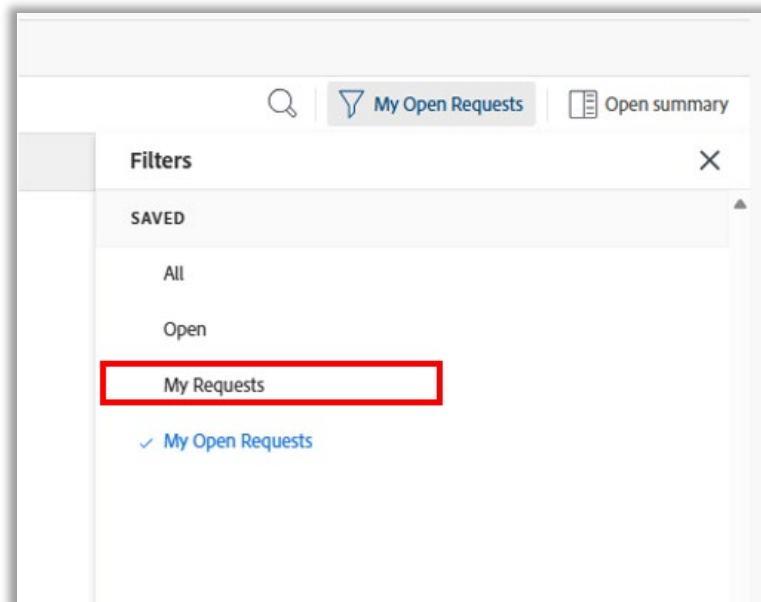
1 - Navigate to SASR Saved Drafts.



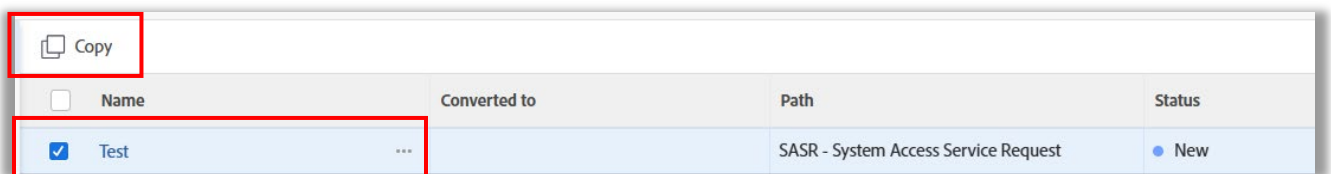
2 – Select the **Submitted** tab.



3 – Click the **My Open Requests** filter and choose **My Requests**.



4 – A list of previously submitted requests will be displayed. Locate the request you would like to duplicate, check the box and click **Copy**.

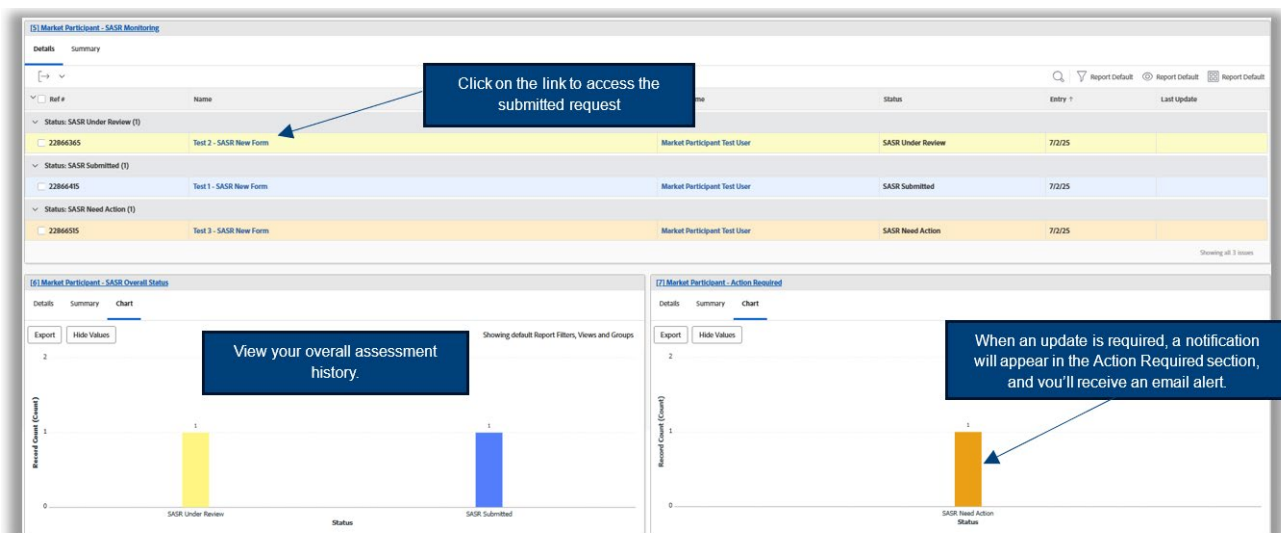


5 – Enter a new name for the SASR and update any information as required before submitting.

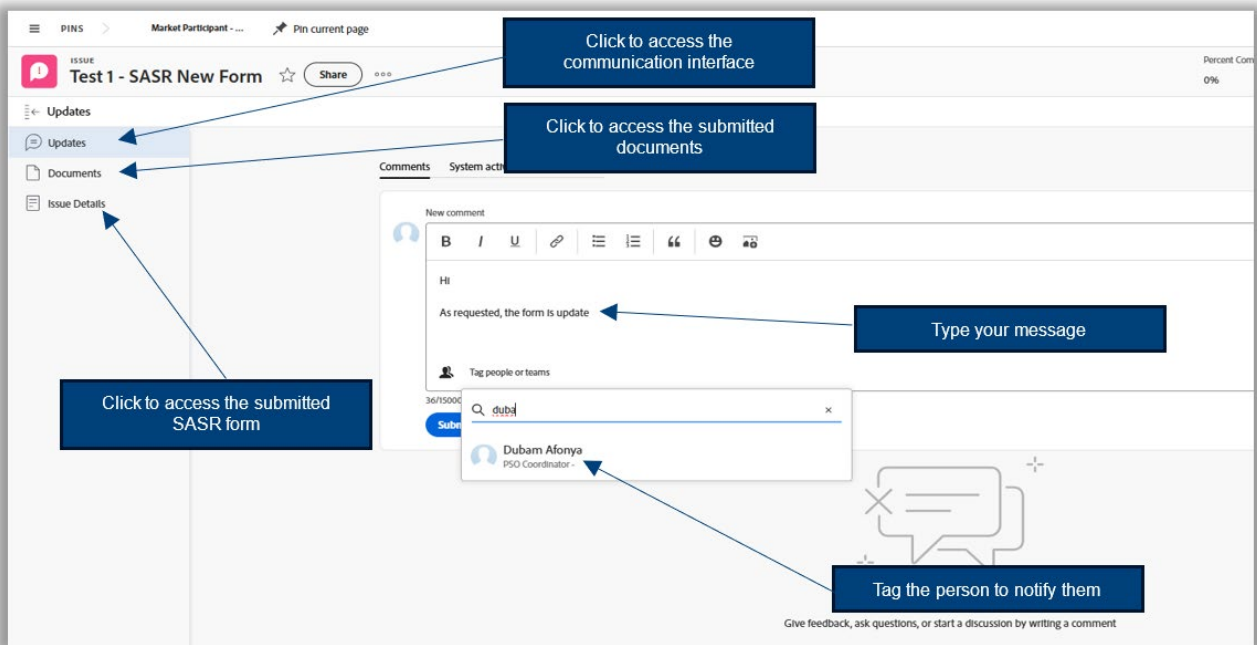
3.4.2 Convert to PDF

Workfront can generate a PDF file of a submitted request. This option is available only after a request has been submitted. To generate a PDF, follow the steps below.

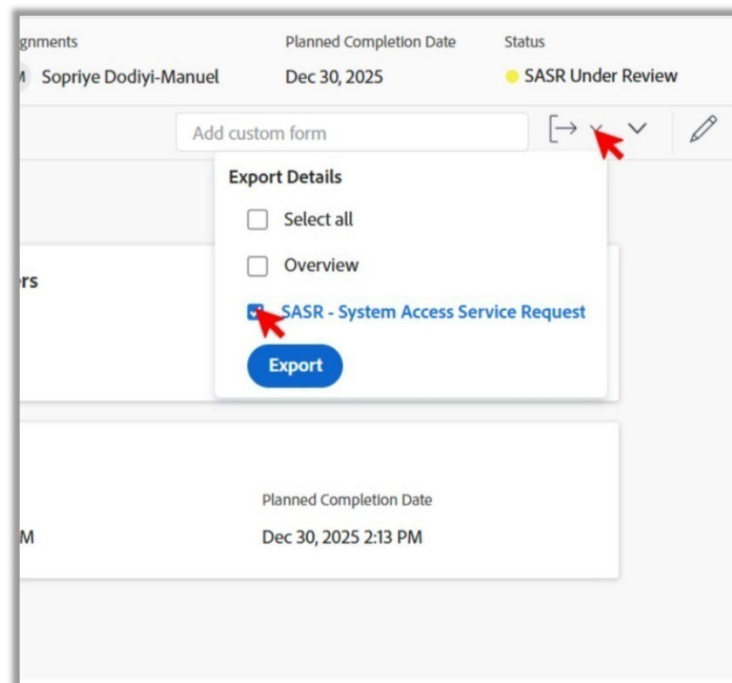
1 – In the **SASR Monitoring Report**, locate and click the name of the submitted SASR request.



2 – Select **Issue Details**.



3 – In the **Status** section, click the dropdown menu, select the **SASR Custom Form**, and then click **Export** to generate the PDF file.



4. Customer Project Management SharePoint Online site

4.1 Requesting Access

All Market Participants who have an existing Adobe Workfront account automatically have access to SharePoint Online.

For first-time access, users must complete the account registration process, configure Multi-Factor Authentication (MFA), and accept the Terms of Use. If you are already registered on another AESO SharePoint Online site, please use the same account configured in your Microsoft Authenticator app.

If you have lost access due to a new phone, a change to your Microsoft Authenticator app, or if you can access Adobe Workfront but are unable to access SharePoint Online, please send an email to customer.connections@aeso.ca requesting an MFA reset or access review.

4.2 First Time Access

When accessing the CPM SharePoint Online site for the first time, users will be prompted to complete the Microsoft account registration process and configure Multi-Factor Authentication (MFA).

To complete the initial setup:

1 – From your Workfront dashboard, select any project folder displayed in your workspace. This will launch the CPM SharePoint Online registration process.

[7] Market Participant - Project Monitoring

Project Reporting Name	Assessment Type	Project Type	PM	Status	Stage 0	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6
P2593 Test Project 4	Independent	BTF	Rahul Deshpande	Active	Complete Aug 8, 2022 SASR-Jul 22, 2022	Complete Jan 9, 2023	Complete Dec 4, 2023	Complete	Complete Mar 28, 2025 NID:	IN PROGRESS Final ISD:Jan 31, 2027	Future
P2614 Test Project 5	Cluster 03	Connection	Young Dawson	Active	Complete Oct 18, 2022 SASR-Sep 28, 2022	Complete Feb 10, 2023	Complete Mar 14, 2024	Complete Jun 10, 2025	IN PROGRESS Jul 31, 2026 NID:Jan 30, 2026	Future Sep 2, 2027 Final ISD-Sep 1, 2027	Future Apr 17, 2028

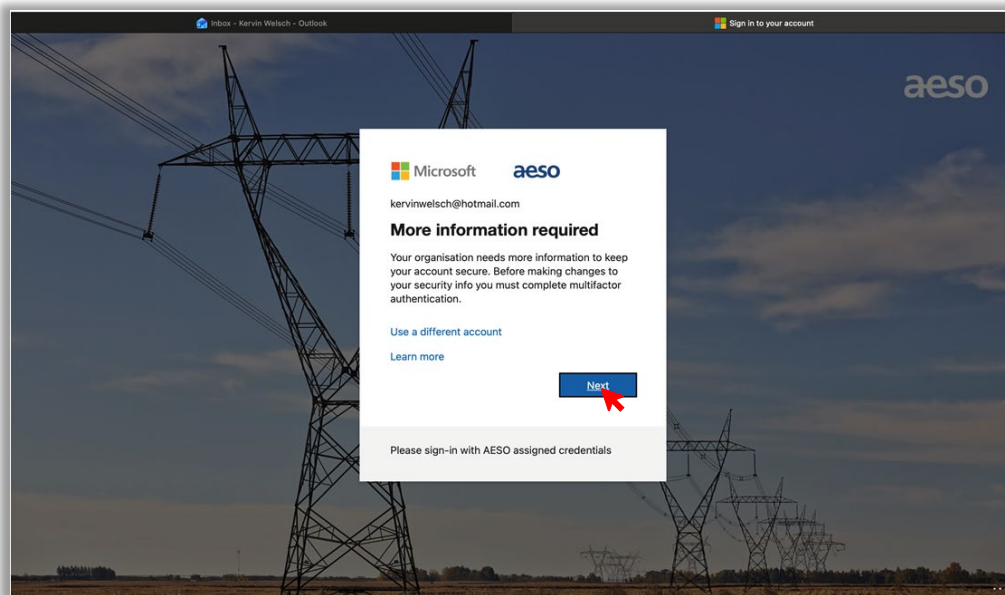
Showing all 2 projects

[8] Market Participant - Project List - Collaborative Folders / Geographic Map Access

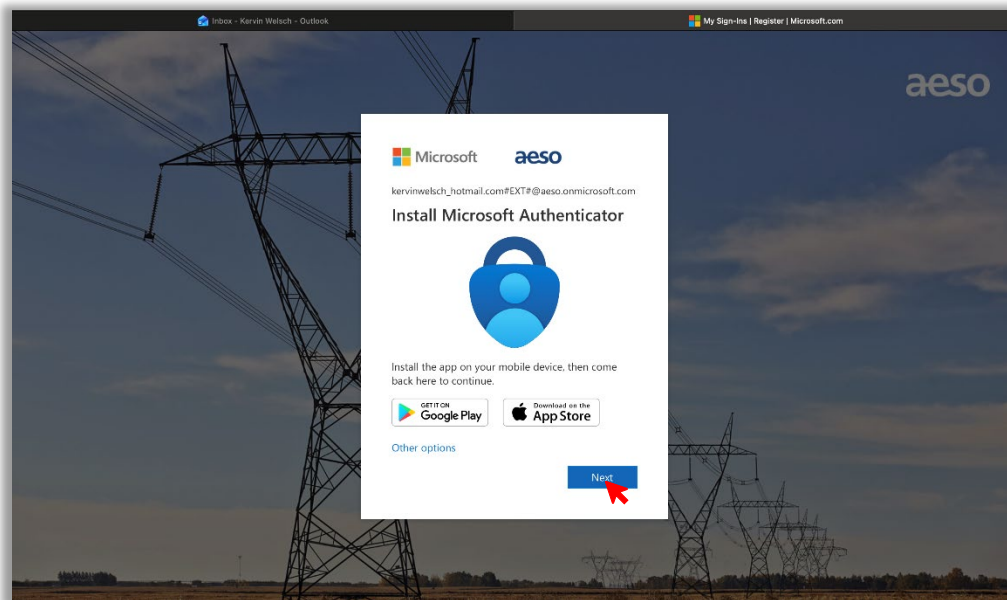
Project Reporting Name	Type	MP Folder	MP and Consultant Folder	MP and TFO Folder	View Map
P2593 Test Project 4	BTF				https://aeso.maps.arcgis.com/apps/instant/sidebar/index.html?appid=2bda04ca9b1e48c397628f0c4de6c0216&project=2593&level=10
P2614 Test Project 5	Connection				https://aeso.maps.arcgis.com/apps/instant/sidebar/index.html?appid=2bda04ca9b1e48c397628f0c4de6c0216&project=2614&level=10

Showing all 2 projects

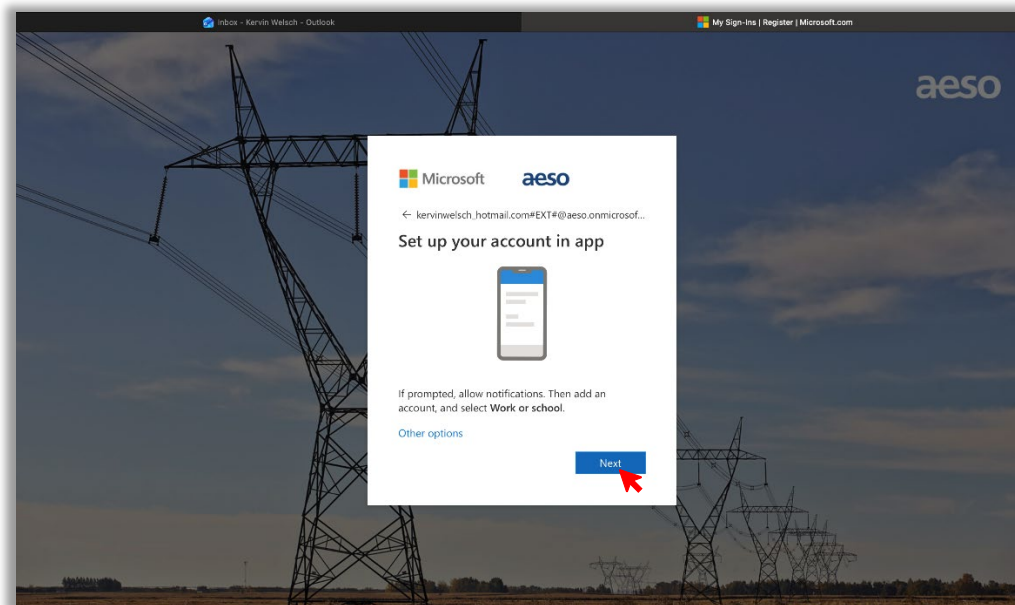
2 - When the **More information required** message appears, click **Next**.



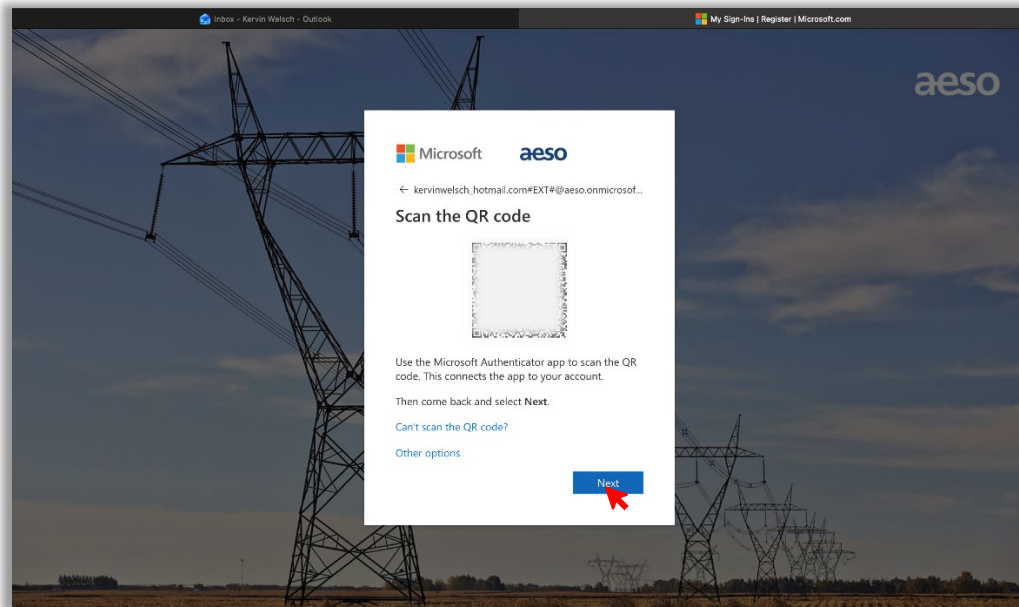
3 – If you do not already have the Microsoft Authenticator app installed, download and install it on your mobile device. On your computer, click **Next** to continue the MFA setup process.



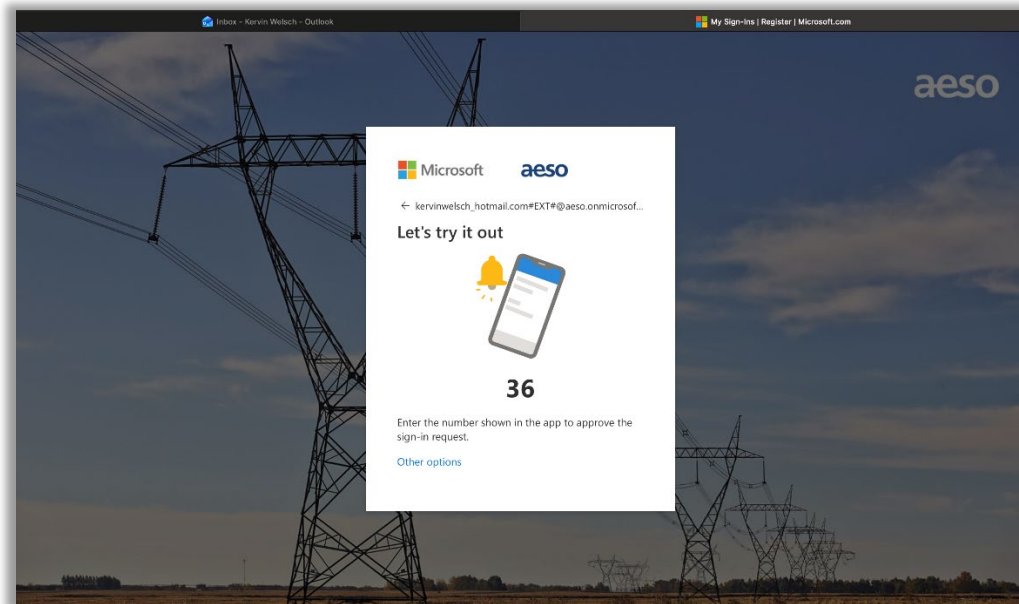
4 – Open the Microsoft Authenticator app on your mobile device and add a new work or school account.



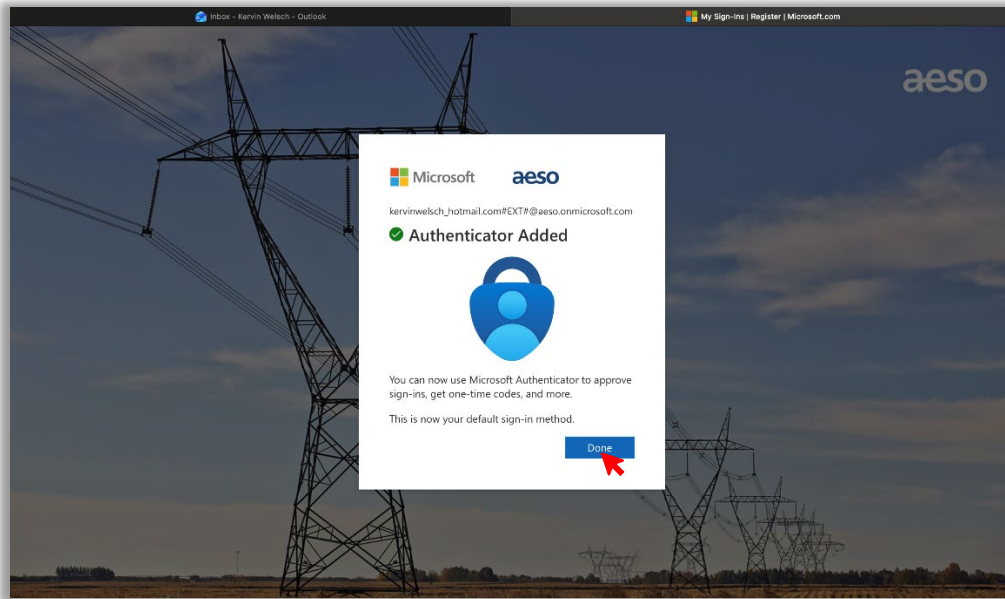
5 – Use the Microsoft Authenticator app to scan the QR code displayed on your computer screen. After scanning the QR code, click **Next** on your computer.



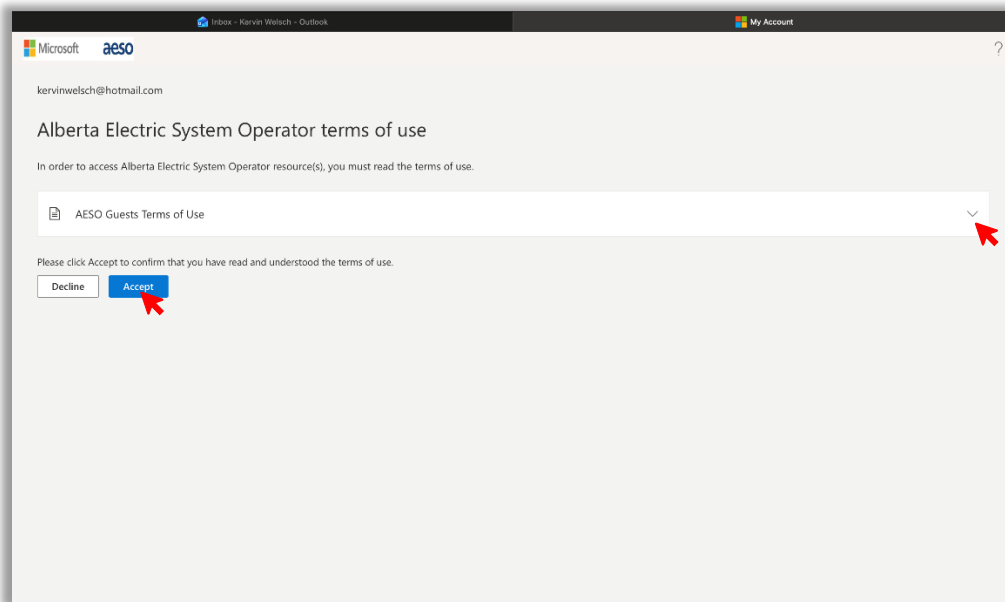
6 – A number will be displayed on your computer screen. Enter this number in the Microsoft Authenticator app to approve the sign-in request.



7 – Once the Microsoft Authenticator app has been successfully added, click **Done**.



8 – Review the AESO Terms of Use and click **Accept** to complete the registration process.



After completing these steps, access to the CPM SharePoint Online site will be granted.

5. Frequently Asked Questions (FAQ)

Do I need a separate SharePoint Online account?

No. Your existing Workfront account provides access to CPM SharePoint Online.

Can I continue using email to share documents?

Project documentation should be managed through CPM SharePoint Online whenever possible.

What if I change my phone or lose access to MFA?

Contact customer.connections@aeso.ca to request an MFA reset.

Can I access SharePoint directly?

Workfront should remain the primary access point to the Customer Project Portal.

Which projects are eligible for the Customer Project Portal?

The initial implementation of the Customer Project Portal includes:

- **Cluster 3 projects.**
- **Independent projects with a SASR submission date on or after June 29, 2026.**

Projects submitted before this date are not included in the initial rollout and will be incorporated gradually in future phases.

If you are unsure whether your project is eligible, please contact customer.connections@aeso.ca for assistance.