BEACON microFIT Supplier DIGITAL USER GUIDE
Registration, Overview and Account Maintenance
Table of Contents

Getting Started............................................................................................................................3
  What is Beacon? .......................................................................................................................... 4
  microFIT Program Roles .............................................................................................................. 4
  Registering Your Login ............................................................................................................ 5
Beacon Overview......................................................................................................................11
  Sign in to Beacon ................................................................................................................... 12
  My Tasks Page ........................................................................................................................ 13
  Requests Page ....................................................................................................................... 14
    Request Record Overview .................................................................................................... 15
  Manage Suppliers Page ........................................................................................................... 18
    Supplier Record Overview ................................................................................................... 19
  Manage Contracts Page .......................................................................................................... 20
    Contract Record Overview ................................................................................................ 21
  Manage Profile Page ............................................................................................................. 22
    Person Record Overview .................................................................................................... 23
Account Maintenance.............................................................................................................24
  Changing Your Contact Information ....................................................................................... 25
  Changing your Password ....................................................................................................... 28
  Resetting Your Password ..................................................................................................... 30
  Updating your Challenge (“Forgot Password”) Question .................................................... 31
  Additional Resources ........................................................................................................... 33
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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Approver</td>
<td>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.</td>
</tr>
<tr>
<td>Supplier Agent</td>
<td>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. A Supplier Agent cannot submit or review requests to the IESO.</td>
</tr>
<tr>
<td>IESO</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

01 Go to http://www.ieso.ca/Get-Involved/microfit/login.

02 Select Register for Beacon.

This brings you to the Registration page.
03 Enter your first name, last name and email address.

04 Select Register.

05 You will receive an account activation email shortly. Open the activation email, and then select Activate Account.

This brings you to the registration window.
06 Enter a password.

07 Choose a forgot password question and enter the answer to the question. If you forget your password, this question will be used to verify you.

08 Select Create My Account. This brings you to the Registration Portal.
09 Select Got it!

09 Select the IESO logo.
This brings you to the Available Programs dashboard.

11 Select the FIT-microFIT Supplier program tile.
12 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.

13 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**.

14 A dialog box is opened, select Yes.

All the contact information you have submitted is correct and register as a Supplier Contact?

[NO] [YES]
This brings you to the **Registration Confirmation** page.

15  Select Open Supplier Registration page.

You now have access to Beacon.
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


02 Enter your account username and password.

03 Select Sign In.

This brings you to the Available Programs dashboard.

04 Select the FIT-microFIT Supplier program tile.

This brings 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.

You can search for Requests by using these filters.

To navigate to different sections of the portal, use the tabs on the ribbon.

To see a Request Record, select the Request ID.

To begin a task, select the active task name.

To see the Request’s current status, hover over the Status icon.

Select any header to sort your active Request tasks by those criteria.

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Request Type</th>
<th>Status</th>
<th>Source</th>
<th>Active Task</th>
<th>Assigned To</th>
<th>Assigned On</th>
<th>Deadline</th>
<th>Requested On</th>
<th>Requested By</th>
</tr>
</thead>
<tbody>
<tr>
<td>SS170</td>
<td>Change to Supplier Legal Name</td>
<td>IESO Review</td>
<td>Supplier</td>
<td>Review Returned Change Request</td>
<td>John Smith</td>
<td>Jul 16, 2019 09:51 AM EST</td>
<td>Jul 26, 2019 05:00 PM EST</td>
<td>Jul 16, 2019 09:44 AM EST</td>
<td>John Smith</td>
</tr>
</tbody>
</table>
Requests Page

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

You can search for Requests by using these filters.

To see all Requests, change Status from OPEN to show all.

Select any header to sort your Request tasks by those criteria.

To see a Request Record, select the Request ID.
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:

To view and download documents related to the Request, select the Attachments tab.

To see available actions that you can take, select the Related Actions tab.

The Milestone bar shows the progress of the Request.

The Pending Task(s) table shows details about the task(s) assigned to you or to others.
The following figure shows the Record for a closed Request:

### Supplier Registration [53167]

<table>
<thead>
<tr>
<th>Summary</th>
<th>Supplier Info</th>
<th>Partners</th>
<th>Attachments</th>
<th>Related Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Time
- **Submitted**: Jul 18, 2019 09:37 AM EST
- **IESO Review**: Jul 18, 2019 09:36 AM EST
- **Closed**: Jul 18, 2019 09:37 AM EST

#### Close Request - Closed
- **Time**: Jul 18, 2019 09:37 AM EST
- **Performed By**: SYSTEM - AUTO
- **Role**: IESS
- **Reason**: Approved
- **Comment**: < No Comment >

#### Request - New Supplier Registration
- **Request ID**: 53167
- **Request Type**: New Supplier Registration
- **Requested On**: Jul 16, 2019 09:26 AM EST
- **Requested By**: John Smith
- **Submission Reason**: Registering Supplier for a Contract Assignment
- **Supplier**: ABC Joint Venture
  - **Supplier ID**: 531340
  - **Supplier Type**: microFIT
  - **Legal Entity Type**: Joint Venture - No Legal Personality
- **Reviewed On**: Jul 16, 2019 09:26 AM EST
- **Completed On**: Jul 16, 2019 09:37 AM EST

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To view and download documents related to the Request, select the Attachments tab.

To see available actions that you can take, select the Related Actions tab.

The Milestone bar shows the progress of 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.

<table>
<thead>
<tr>
<th>Task History</th>
<th>Time</th>
<th>Performed By</th>
<th>Role</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Request - Closed</td>
<td>Jul 16, 2019 09:36 AM EST</td>
<td>IESO</td>
<td>IESO</td>
<td>Et ligula ullamcorper malesuada proin libero nunc consequat. Est lorem ipsum dolor sit amet consectetur adipiscing. Sit amet consectetur adipiscing elit pellentesque habitant morbi.</td>
</tr>
<tr>
<td>Review Supplier Registration - Approve</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Returned Supplier Registration - Clarification Provided</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-process microFIT Supplier Registration - Return To Supplier For Edit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete Supplier Registration - Submit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To expand the task Record, select the arrow (>).
Manage Suppliers Page

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

You can search for Suppliers by using these filters.

To register a new Supplier, select Register New Supplier.

To see a Supplier Record, select the Supplier ID.

To see the status of the Supplier, hover over the icon.

To add or remove Contacts from Supplier(s), select Add/Remove Contacts for Supplier(s).

Select any header to sort your Suppliers by those criteria.

You can search for Suppliers by using these filters.
Supplier Record Overview

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

If there is an active Request or a draft related to a Supplier, the Record will be locked.

To see all the active and closed Requests that are related to the Supplier, select the Request tab.

To view and download documents related to the Supplier, select the Documents tab.

To see the available actions that you can take, select the Related Actions tab.

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.

You can search for Contracts by using these filters.

To initiate a Contract Request, select Submit Contract Changes.

To see the status of the Contract, hover over the icon.

To see a Contract Record, select the Business Contract ID.

To see a Supplier Record, select the Supplier ID.

Select any header to sort your Contracts by those criteria.
Contract Record Overview

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

If there is an active Request or a draft related to a Contract, the Record will be locked.

To see all the active and closed Requests that are related to the Contract, select the Request tab.

To view and download documents related to the Contract, select the Documents tab.

To see the available actions that you can take, select the Related Actions tab.

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

Contract: FIT-MABCDEF

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.

To see a Person Record, select the Person ID.
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.

- To see all the active and closed Requests that are related to the Person, select the Request tab.
- To view and download documents related to the Person, select the Documents tab.
- To see the available actions that you can take, select the Related Actions tab.
- To update your profile, select Update Profile.

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

To change your password and/or your security question(s), select Update Password and/or Challenge Questions.
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

01 Select the Manage Profile tab.

02 To view your account’s Person Record, select your Person ID.

03 Select Related Actions > Update Profile.
04 On the **Contact Information** page, choose a submission reason, and then enter a description for your Request.

![Request - Update to Contact Information](image)

05 Make changes to your contact information, and then select **NEXT >**.

06 **Optional:** On the **Supporting Documents** page, select **UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.

![Supporting Documents](image)

You can upload additional documents or select **NEXT >**.

**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.).*

07 On the **Review** page, look over all your changes, and then select **SUBMIT REQUEST**.
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 Password

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

Procedure

01 Select the Manage Profile tab.

02 To view your account’s Person Record, select your Person ID.

03 Select Update Password and/or Challenge Questions.

Person: John Smith [934104]

- Person Id: 934104
- Account Id: fejafotol@isimpleemail.com
- Person Name: John Bob Smith
- Registration Date: Aug 15, 2013 07:51 AM EST
Your **Account** page opens in a new tab.

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

05 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

02. Select Need help? to show more options.
03. Select Forgot Password?
04. Enter your email, and then select Reset via Email.
05. 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

01 Select the `Manage Profile` tab.

02 To view your account's Person Record, select your `Person ID`.

03 Select `Update Password and/or Challenge Questions`.

Person: John Smith [934104]

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

**04** From the **Forgotten Password Question** section, select **Edit**.

**05** Choose a new question and enter the answer to the question.

**06** 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