GridInterConnect for Transmission (GIC-T) User Guide

SEPTEMBER 21, 2026

Disclaimer

Training Disclaimer

ISO New England (ISO) provides training to enhance participant and stakeholder understanding.

Because not all issues and requirements are addressed by the training, participants and other stakeholders should not rely solely on this training for information but should consult the effective *Transmission, Markets and Services Tariff* ("Tariff") and the relevant *Market Manuals*, *Operating Procedures* and *Planning Procedures* ("Procedures").

In case of a discrepancy between training provided by ISO and the Tariff or Procedures, the meaning of the Tariff and Procedures shall govern.

- Screenshots may appear slightly different than what you see in the latest version, or they may include references to SANDBOX.
- Updates to the user guide will be rolled out incrementally.

Table Of Contents

Change Summary

Revision	Date	Comments
Version 1.0	9/26/2026	Initial release

1. Getting Started

Helpful Terms

Term (Acronym)	Description
Account	A user login that can be granted access (i.e., roles) to one or more interconnection companies (organizations)
Affiliate	An account that has been invited by an administrator of another organization. Affiliates are granted access to projects
GridInterConnect for Transmission (GIC-T)	The software used to complete and submit interconnection requests, sometimes referred to as GridUnity.
GridUnity	The name of the software company that developed GridInterConnect for Transmission (GIC-T), sometimes used to refer to the GIC-T software.
Organization (Org)	The **Interconnection Customer (IC)** company who will be submitting an interconnection request
Member	An employee of the Interconnection Customer who has access to the Organization in GridUnity (including My Organization)
Role	The access level that can be granted to users (accounts) to complete associated tasks. Roles determine visibility of tasks to accounts
Operator	ISO New England is the operator (sometimes referred to as the operator tenant)
Project	An **Interconnection Request (IR)** in GridUnity
Task	A series of fields to complete in the application intake process
Tenant	ISO New England is the tenant. When your organization connects to the ISO-NE Tenant, its members and affiliates are connected automatically

Important Links and Resources

These are links that you may find useful.

- ISO New England Open Access Transmission Tariff (OATT) Home Page
- ISO New England Interconnection Request Page
- Schedule 22 (Large Generator Interconnection Procedures)
- Schedule 23 (Small Generator Interconnection Procedures)
- Schedule 25 (Elective Transmission Upgrade Interconnection Procedures)

2. Creating the Organization and Administrator Account

If the company representing your Interconnection Customer (IC) does not currently have a GridUnity account, it is critical to create its organization and first administrator account properly. This section will help guide you through how to create and set up your organization and its first account.

Both interconnection customers and consultant organizations must create an organization; however, consultant organizations must be invited to affiliate with an interconnection customer's organization in GridUnity. For more information about inviting consultants to affiliate with an IC's organization, see *Section 4: Managing Account Access and Roles*.

Workflow: Create & Setup Organization (Owner Account)

1. Create owner account for the organization (IC)
   ⚠ *By default, this account will become the org's owner in the GridUnity software.*

2. Create new organization using IC name from the Customer and Asset Management System (CAMS) if it exists

3. Request Tenant Access for your organization (submitted to ISO New England)

4. Invite members (employees)

   Invite employees via My Organization > Members using their IC email address to give them view or write access to the org

5. Invite affiliates (consultants)

   Invite affiliates via My Organization > Affiliates
   ⚠ *Affiliates must create an organization*

6. Set account roles for the org and for projects (once created)

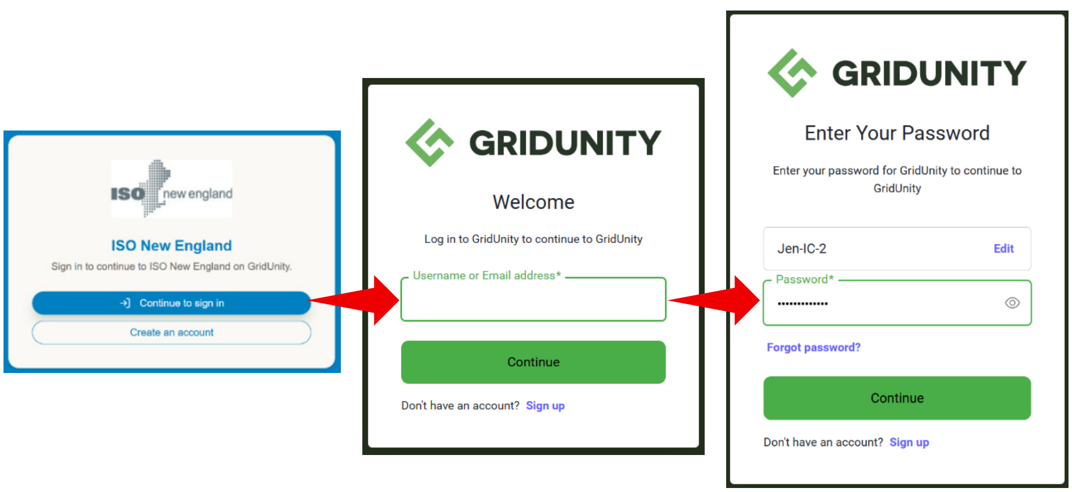
- **Viewer:** Open the project and view its data, status, timeline, and documents.
- **Contributor:** Viewer role, edit requests, upload documents, and submit.
- **Owner:** Contributor role, grant and remove user access and roles.

Once the organization is set up, a New Project may be started. Please note that while the organization and its members and affiliates may be configured before the Cluster Request Window (CRW) opens, you must wait until the CRW to create a new project.

Create the Organization (Interconnection Customer)

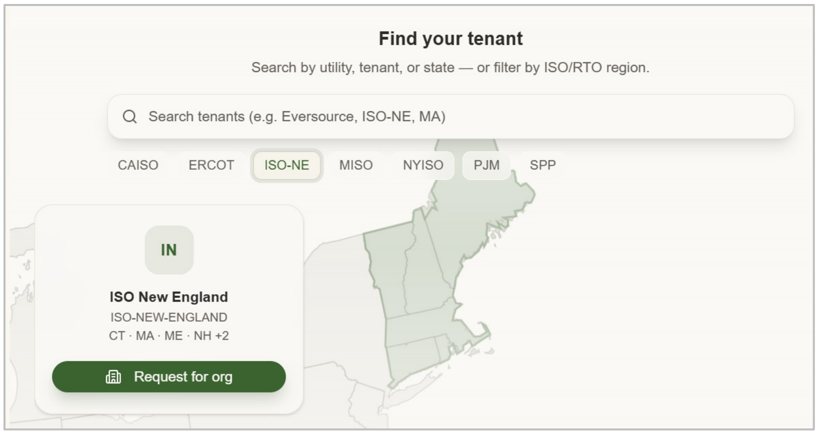
In GridUnity, Interconnection Customer (IC) companies are referred to as organizations. When setting up the IC as an organization in GridUnity for the first time, it is important that it is created correctly. Improperly created organizations could delay the submission of an interconnection request.

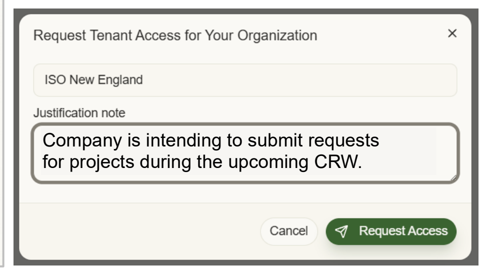
Use Appendix A: Organization and Account Planning Sheet as a guide to help create your organization and user accounts.



1. Navigate to the GridUnity website: http://gridunity.net/e/iso-ne
2. At the home screen, choose Create an Account.
3. Enter your email address, username (optional), and click Continue.
4. Enter a password and click Continue.
5. From the email you used to sign up, click the verification link sent by GridUnity.

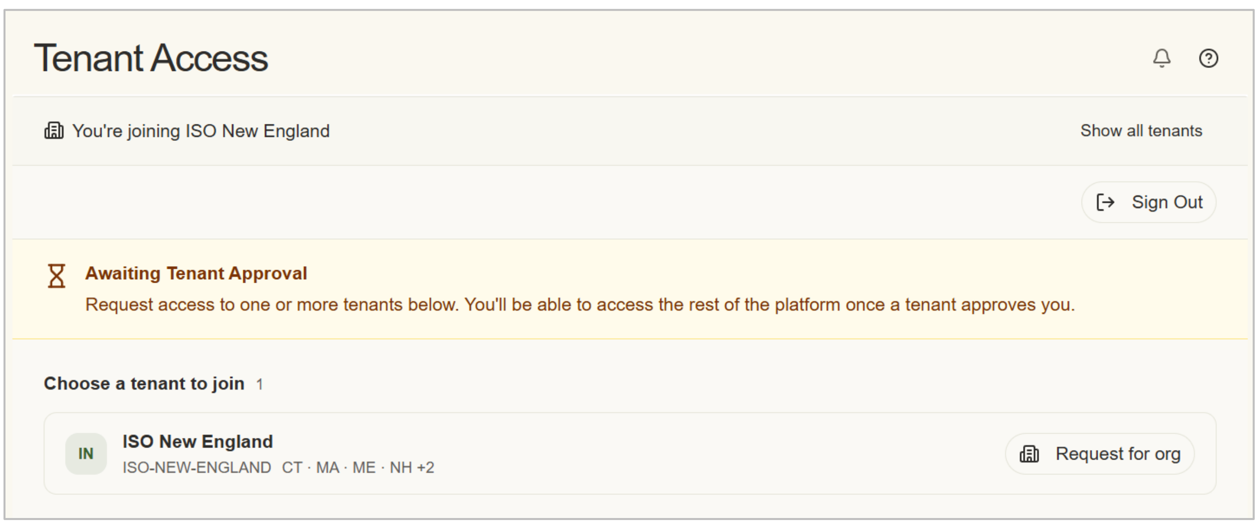
Request Tenant Access





When you log in for the first time, you must find and request access to the Tenant, ISO New England.

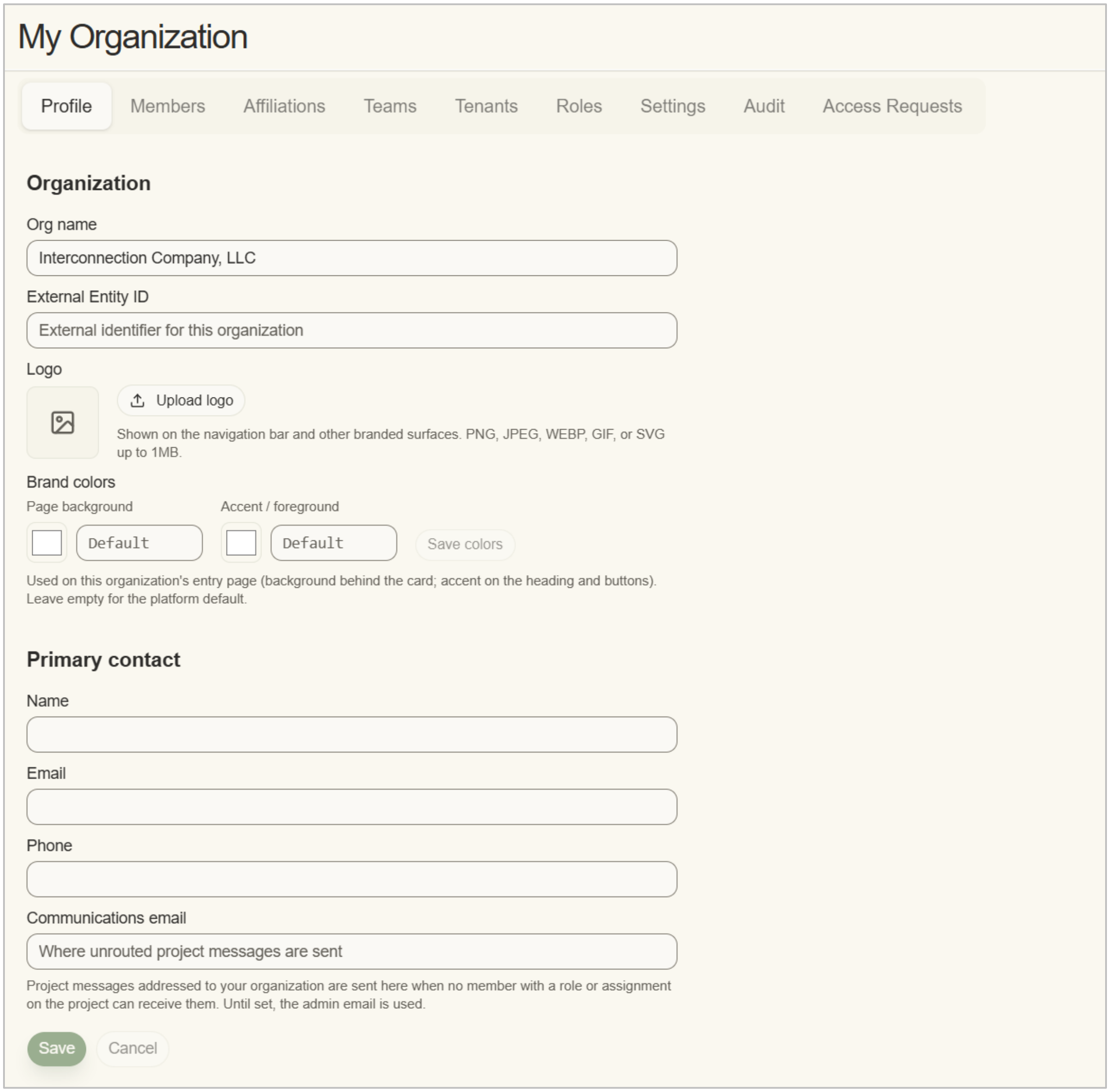
1. Click the ISO New England **Request for org** button.
2. Add a justification note (for ISO New England to review) and click Request Access.
3. Upon Tenant Approval, you will be able to access the GridUnity platform.



Manage Organization Identity

Once an organization is created, navigate to **User Menu > My Organization > Profile** to configure the company's core identity and contact details. When setting up your profile, the **Org name** must be entered exactly as it appears in the ISO New England Customer and Asset Management System (CAMS) to ensure data seamlessly matches across all ISO software platforms.

Additionally, if your company has an existing ISO Customer ID, it is critical that you enter it into the **External Entity ID** field. If your company does not have an ISO Customer ID, please complete and submit the Request Generation Interconnect Customer ID. It may take up to ten (10) business days for ISO New England to review and process this request.



You can also use the My Organization page to designate the organization's primary contact and establish a default communications email for unrouted project messages.

3. Navigating GridUnity

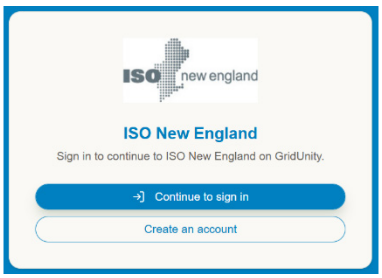
This section introduces the key navigation and workspace components you'll use throughout GridUnity. Understanding how these areas work together will help you access projects, manage tasks, and find the information you need more efficiently.

Navigate to the GridUnity Website

The web address to sign in to GridUnity is https://gridunity.net/e/iso-ne.

Accessing GridUnity

At the home screen, choose one of the following options.



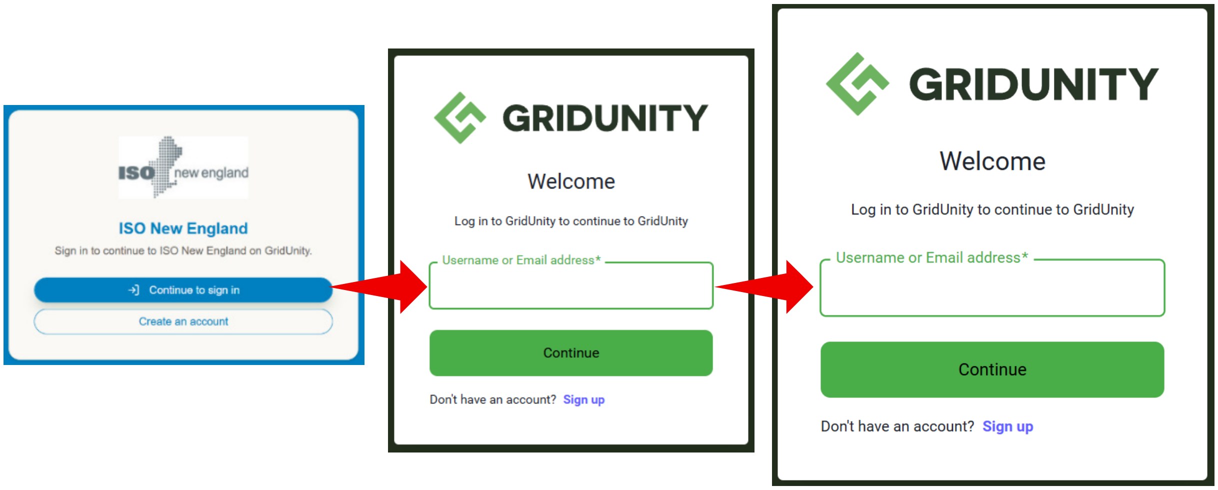
- ***Continue to sign in*** to log in with existing credentials.
- ***Create an account*** to create a new account as an administrator setting up an interconnection customer's org (see Section 2: Creating the Organization and Administrator Account) or as a consultant creating an affiliate firm.

» Note: Most users **should not** create a new account directly from the home screen. Instead, wait for your organization's administrator to send you an email invitation, which will automatically link you to the correct company profile.

Existing Users: Log in to GridUnity (Continue to sign in)

If you have an existing GridUnity account, follow these steps.

1. At the home screen, choose *Continue to sign in*.
2. Enter your username or email address and click Continue
3. Enter your password, and click Continue



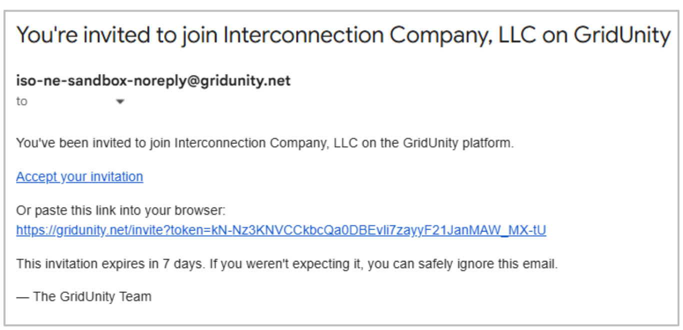
Login Tips

- If you cannot remember your password, select the Forgot password? link.

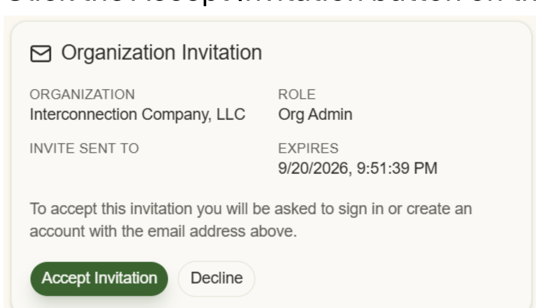
New Users: Accept an Invitation to Join an Organization

If you need an account to access GridUnity, you should ask the GridUnity administrator of the organization representing the interconnection company. When you receive an email invitation, follow the steps below.

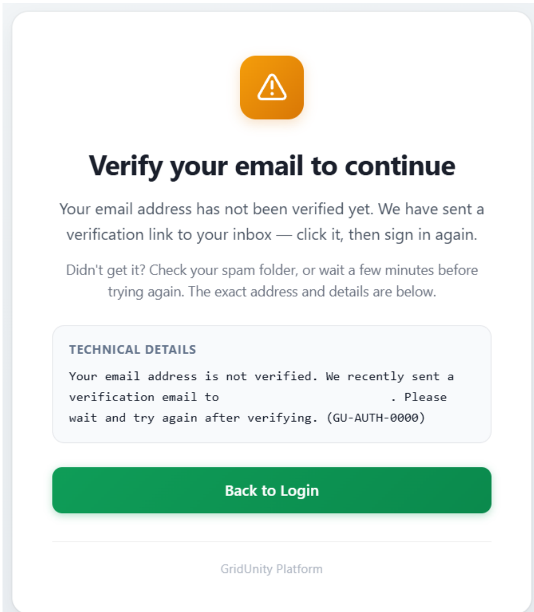
1. Click the link in the email: Accept your invitation.

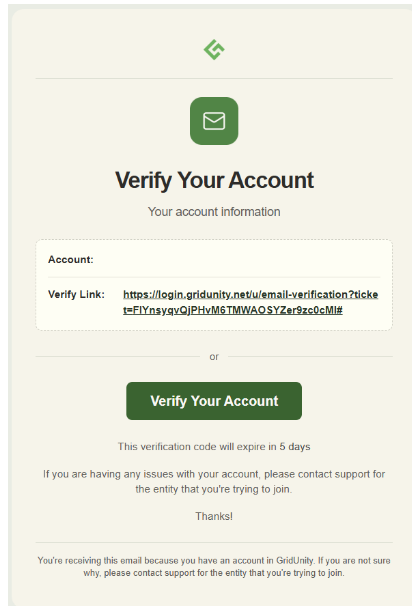


2. Click the Accept Invitation button on the page that opens.



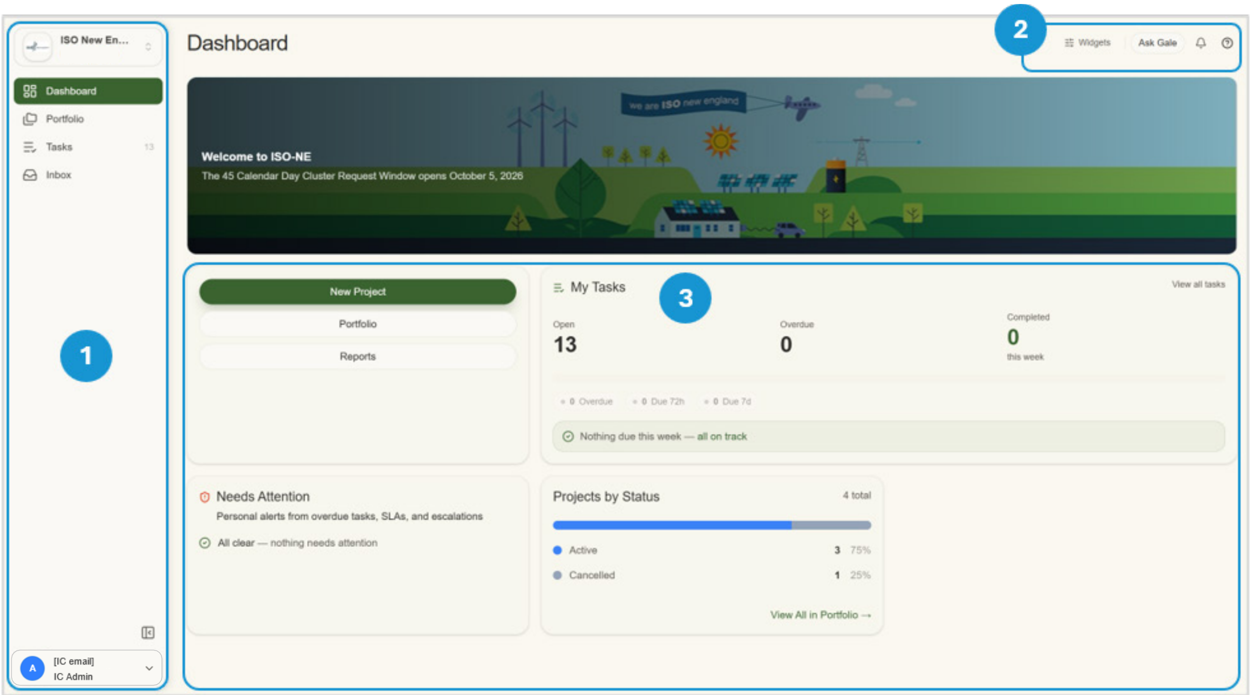
3. Use the same email address as in the invitation to create the account, and optionally add a user name.
4. Add a password and click Create Account. You will receive a message to verify your account.
5. Check your email, and click on the Verify Your Account button in the email.
6. Log in using your new account.



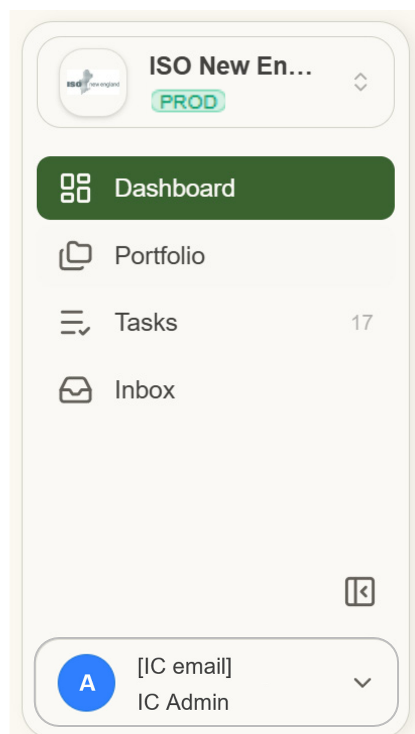


Dashboard Components

The Dashboard is the main landing page in GridUnity and provides a personalized view of your work. From the Dashboard, you can navigate between platform workspaces, access tools and settings, and monitor project activity, tasks, notifications, and other information relevant to your role. The three primary areas of the Dashboard are identified below.



Left Navigation

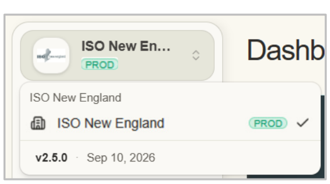


Navigate between the Dashboard, Portfolio, Tasks, and Inbox, switch tenants, and access user and organization settings through the User Menu.

» Note: If you have not yet created a project or been granted access to a project, the left navigation will be unavailable.

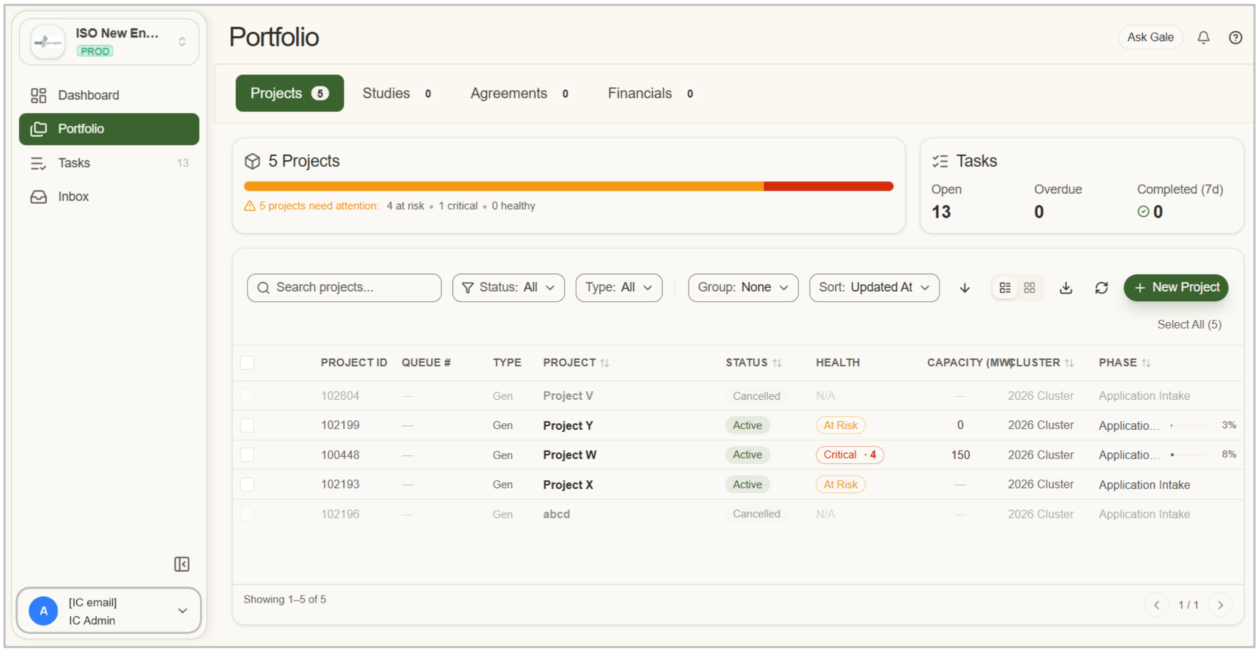
Switch Tenants

In some situations, you may be able to select between more than one Tenant. Use the Tenant drop-down to change tenants or to confirm the tenant where you are currently signed in.



Portfolio

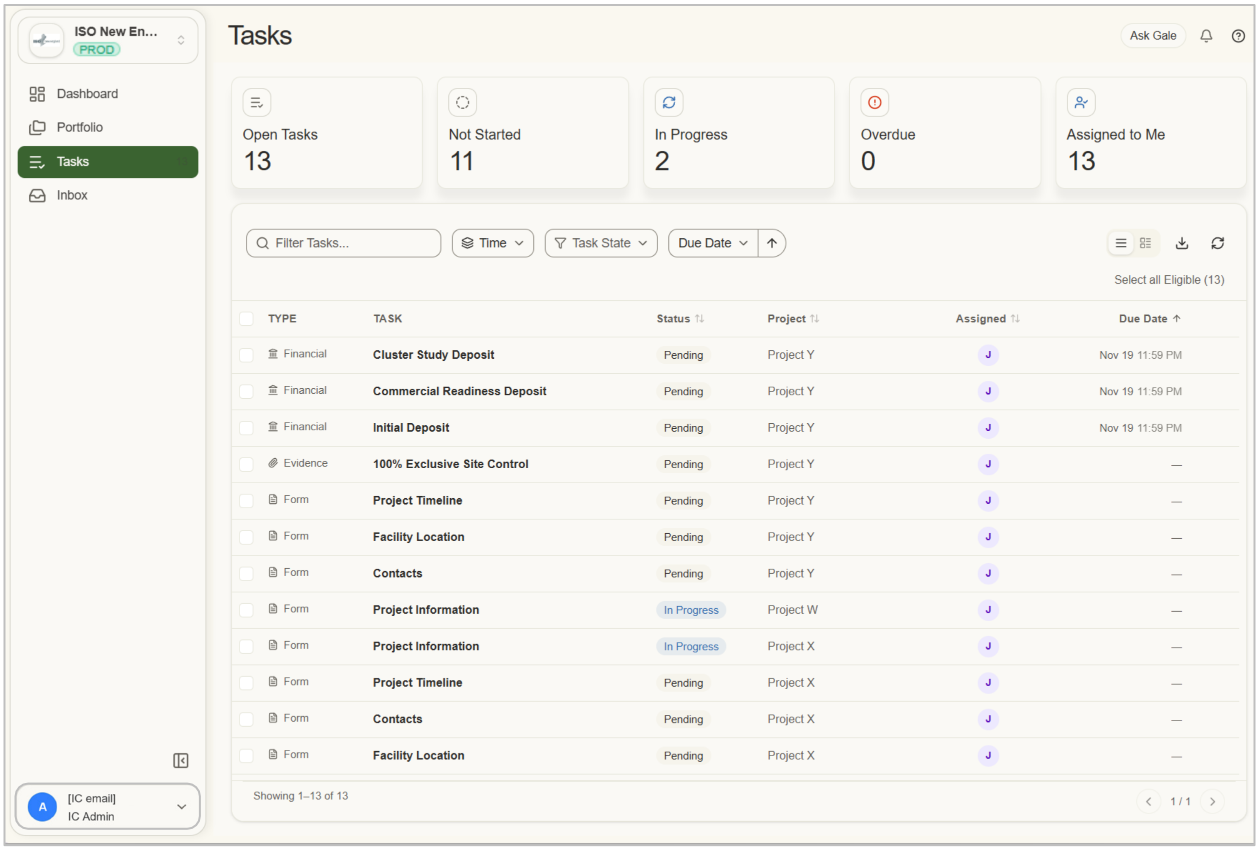
Portfolio is a cross-project analytics and management workspace to oversee multiple projects across various stages of the interconnection lifecycle. It provides a sortable and filterable grid of all your projects. There are four major sections of Portfolio: Project, Studies, Agreements, and Financials.



Your specific interconnection requests will appear under the Projects tab.

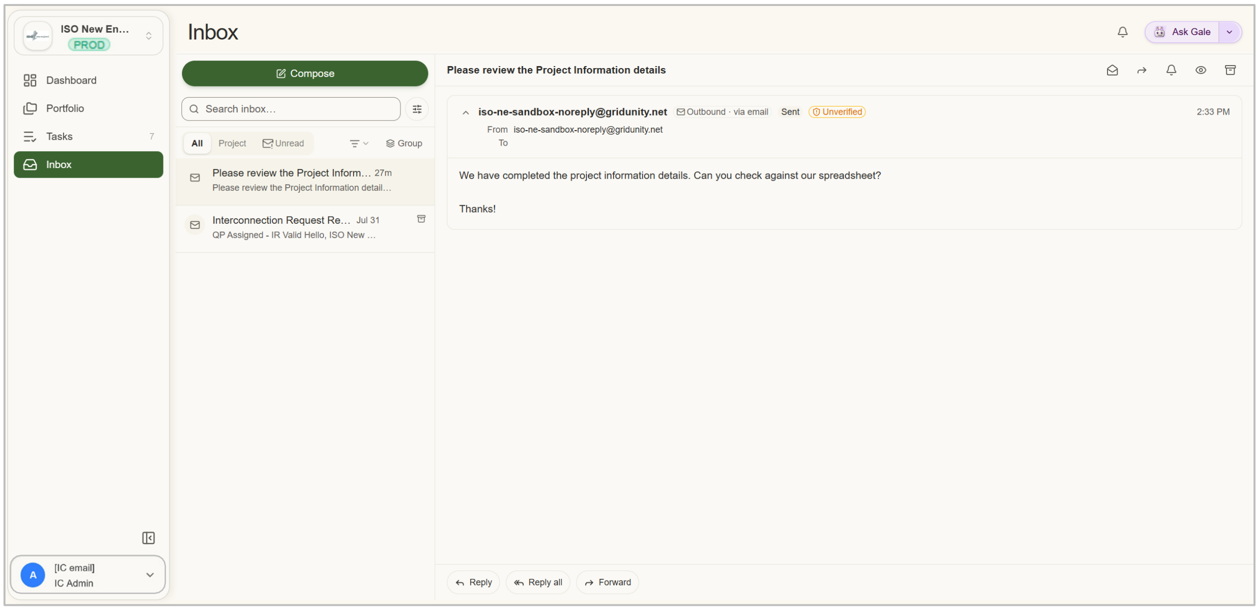
Tasks

The Tasks page is your cross-project work queue. It aggregates every task assigned to you or your team across all of your projects into a single list sorted by urgency, allowing you to track what is overdue or due soon without having to open each project individually. Selecting a task links directly back to its specific project workspace for full context. Note that these items also appear inside the individual project's dedicated Tasks tab.



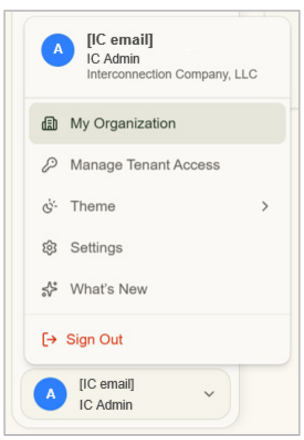
Inbox

The Inbox centralizes project-related conversations—including project threads, direct messages, and system emails—into one view where you can filter messages by project or unread status. Message sent from a specific project will appear both in this master Inbox and within that project's dedicated communications tab.



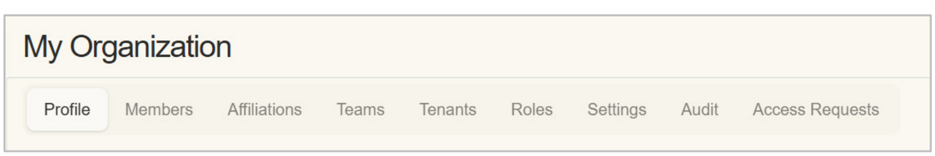
User Menu

The User Menu provides access to account, organization, and tenant management functions. Use it to manage your organization, access tenants, update personal settings, view product updates, and sign out of the platform.



The User Menu contains the following options:

My Organization



Manage organization information, members, affiliations, and teams, assign roles, adjust Single Sign-On (SSO) settings, and view audit and access requests.

Manage Tenant Access

View available tenants, request access to new tenants, and switch between approved tenants.

Theme

Change the appearance of the platform by selecting a preferred theme.

Settings

Configure personal account preferences, application settings, and notification settings.

What's New

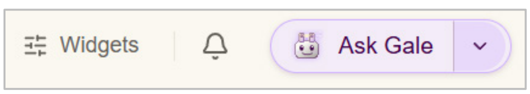
View information about recently released features and platform updates.

Sign Out

Sign out of the current GridUnity session.

Toolbar

Access dashboard tools, including widget settings, notifications, GALE AI, and help resources.



Widgets

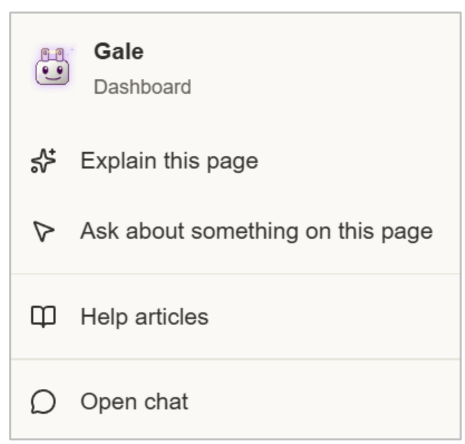
Select Widgets to customize your dashboard.

Notifications

The bell icon located in the Dashboard's toolbar provides direct access to your GridUnity notifications, which include platform messaging and task updates.

Ask Gale

For getting quick answers about something on the page, or to access help articles, use the Gale AI assistant or the knowledge base.



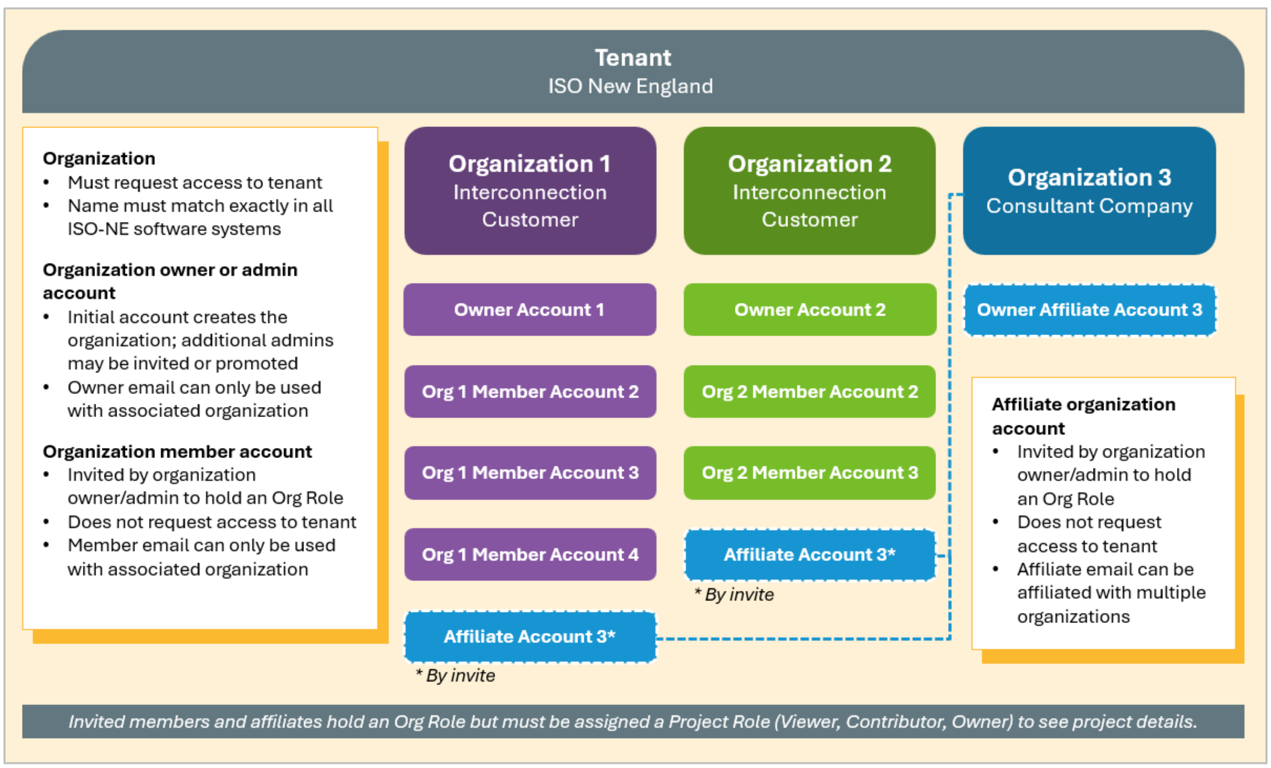
››› Please note: ISO New England does not recommend using Gale AI to generate data. ISO New England strongly recommends thoroughly reviewing any AI generated data before submitting.

Widgets

Widgets provide configurable summaries of tasks, projects, portfolio status, and announcements that you can turn on or off to tailor the dashboard view to your own specific workflow.

4. Managing Account Access and Roles

From within an organization, account access in GridUnity is controlled at the organizational level and at the project level. It is critical to understand that organization roles and project roles are completely independent. For example, being an Organization Admin governs what you can do within your company's profile, but it grants no project access by itself. Your ability to view, edit, or submit a specific interconnection request is dictated entirely by your assigned project role. This section covers how to create accounts, group users into teams, and assign roles for both internal employees and external consultants.



Account Access (Inviting Member and Affiliate Accounts)

There are two types of accounts that can be created in GridUnity:

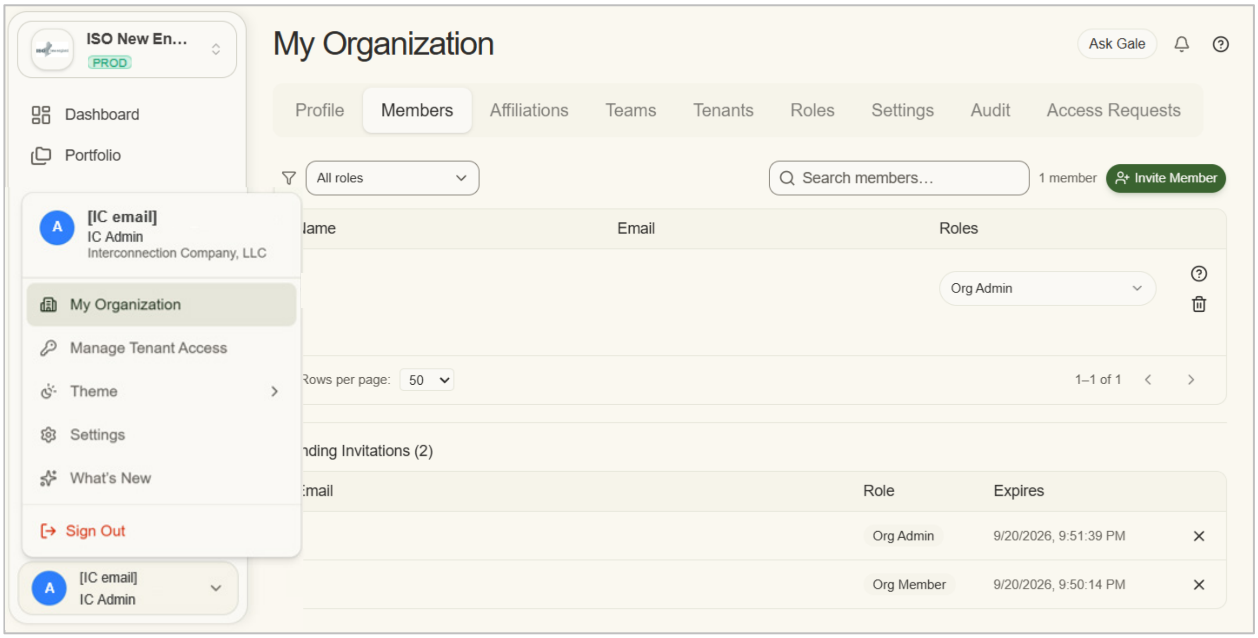
- Member Accounts: Employee of the organization (interconnection customer)
- Affiliate Accounts: Consultants or consultant companies (affiliations)

This section covers how to create and remove member and affiliate accounts.

Member Accounts

From **User Menu > My Organization > Members** you can view active organization members, invite or revoke members, track pending member invitations, and change member roles (Org Admin or Org Member).

›› Please note: Do not invite consultants as members; please use Affiliations instead.



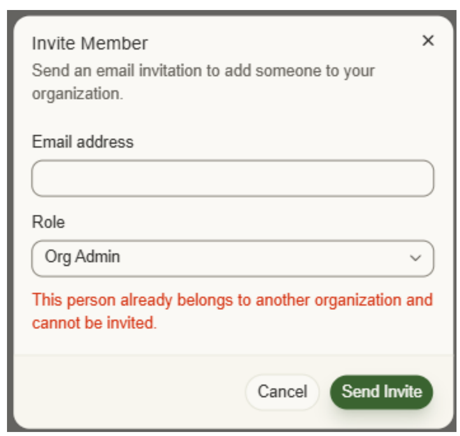
Inviting Members

Use the **Invite Member** button to add new users to your company.

1. Click the Invite Member button.
2. Enter the email address.
3. Assign a role (Org Admin or Org Member).

The invited member will be listed under Pending Invitations.

›› Please note: If a user's email address is already associated with a different organization in GridUnity, the system will display a red error message.



Change Roles or Revoke Member Access

Organization administrators can manage an organization's membership and roles. Follow these steps to change a user's role or remove them from your company entirely:

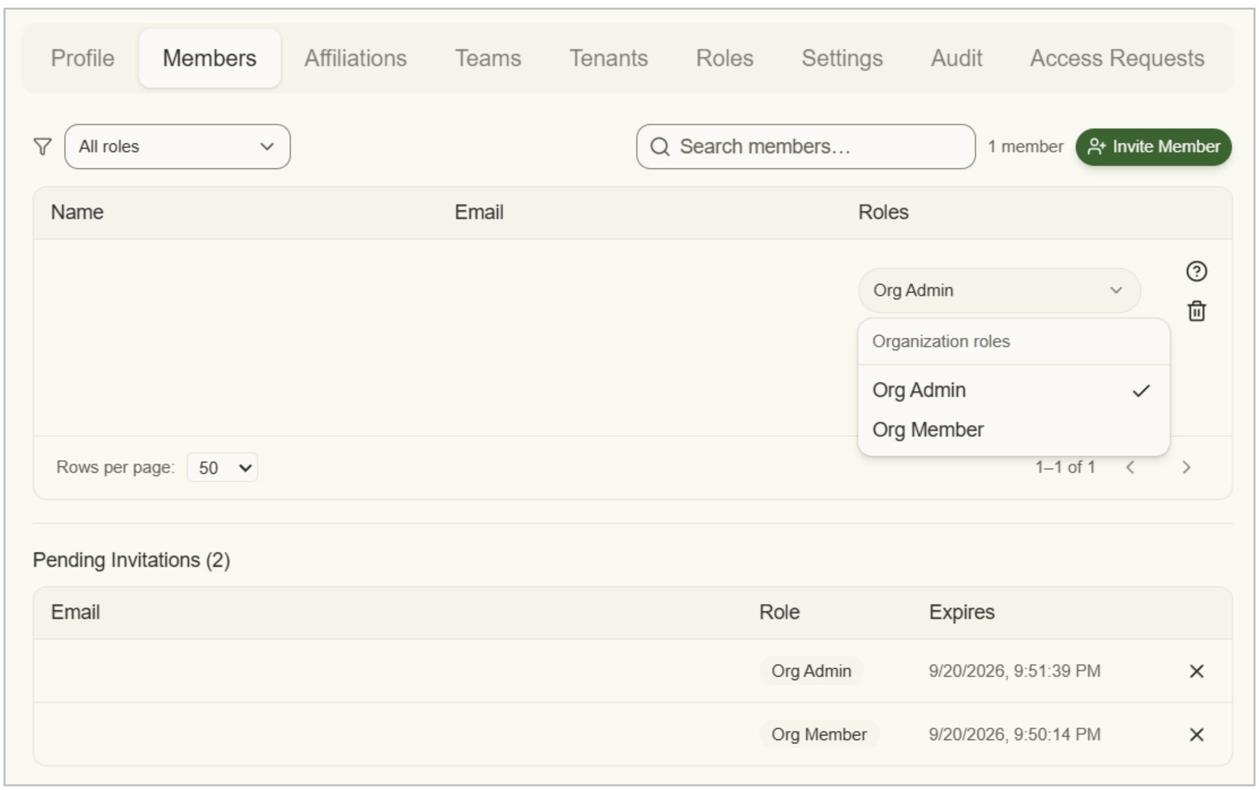
Change a role

1. Locate the specific member in the Members list.
2. Click the dropdown menu under the Roles column.
3. Select the new role (Org Admin or Org Member).

Revoke access

If you need to remove a member for any reason (for example, accidentally inviting a consultant to be a member, or if an employee leaves the company), you should revoke their membership to your organization in GridUnity.

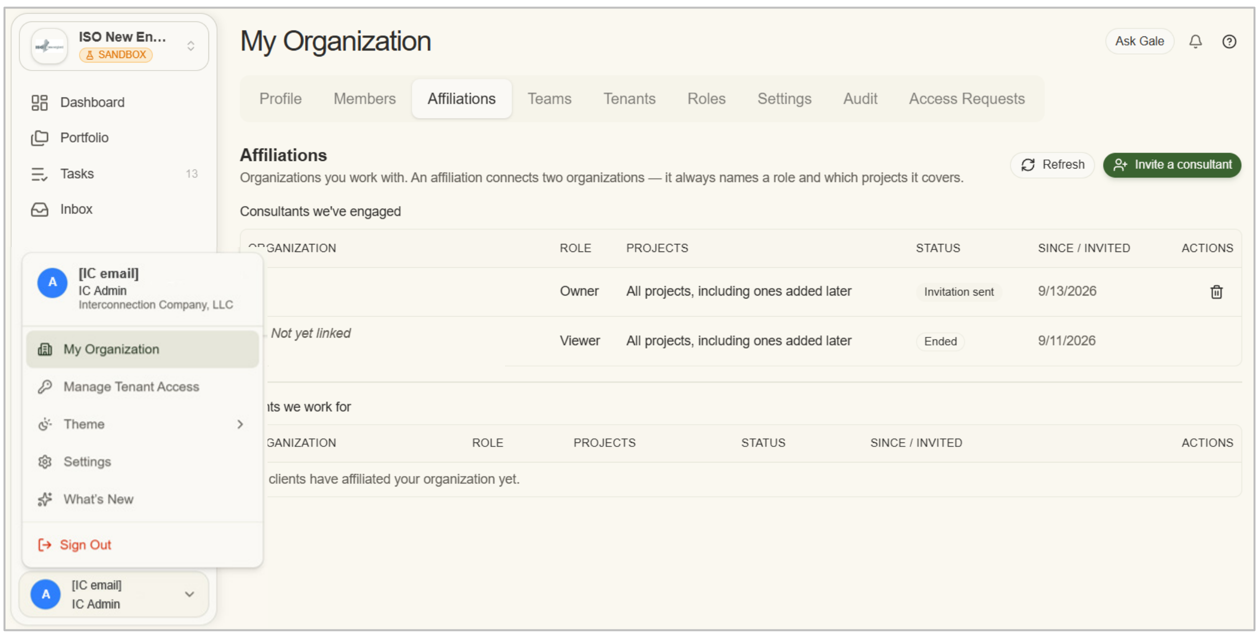
1. Locate the specific member in the Members list or under Pending Invitations.
2. Click the trash can icon to the right of their row to remove from the organization.



››› Important Note: Revoking membership to a member account does **not** remove project-level access granted from directly within a project. You must also remove access from each individual project where the member account was invited.

Affiliate Accounts (Consultants)

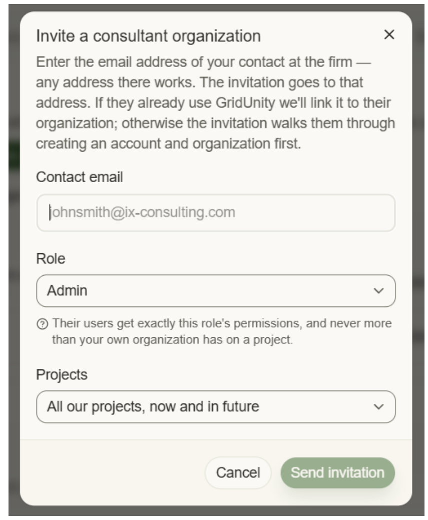
From **User Menu > My Organization > Affiliations** you can view active personnel, invite or revoke members, track pending invitations, and change roles (Org Admin or Org Member).



Inviting Affiliates

Use the **Invite a consultant** button to add new users to your company.

1. Click the Invite a consultant button.
2. Enter the email address.
3. Assign a role (Admin, Contributor, or Viewer).
4. Click Send invitation.



The invited affiliate organization will be listed under *Consultants we've engaged* in Affiliations.

Change Roles or Revoke Affiliation Access

Organization administrators can manage an organization's membership and roles. Follow these steps to change a user's role or remove them from your company entirely:

Change a role

1. Locate the specific member in the Consultants list.
2. Click the dropdown menu under the Roles column.
3. Select the new role (Admin, Contributor, or Viewer).

Revoke access

If you need to remove an affiliate account for any reason (for example, accidentally inviting a member to be an affiliate, or if a contractor ends their services with your organization), you should revoke their membership to your organization in GridUnity.

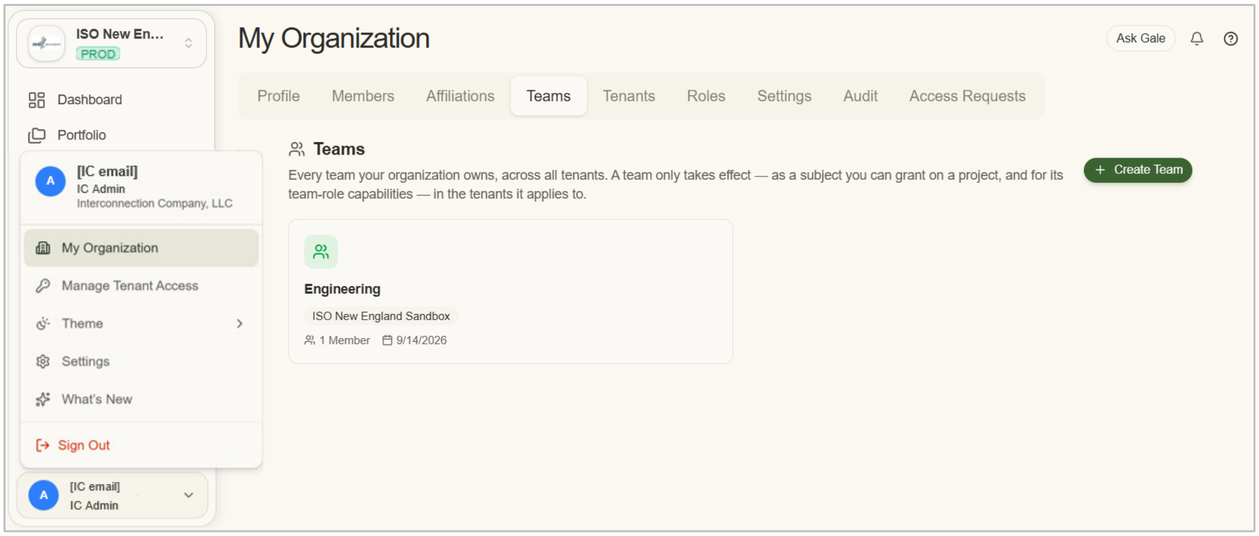
1. Locate the specific affiliate in the Consultants list or under Pending Invitations.
2. Click the trash can icon to the right of their row to remove from the organization.

››› Important Note: Revoking membership to an affiliate account does **not** remove project-level access granted from directly within a project. You must also remove access from each individual project where the affiliate account was invited.

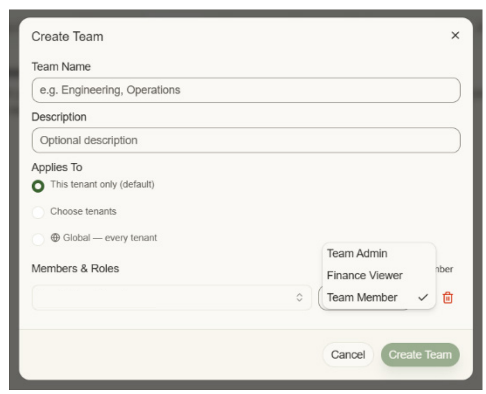
Teams (Group Access)

Teams are named groups within your organization in GridUnity that allow you to grant project access or assign work to multiple people all at once. Once you create a Team and assign teammates, you can then assign roles to that team.

From **User Menu > My Organization > Teams** you can view active Teams or create new ones. By grouping users together, Organization Administrators can streamline permissions rather than managing access individually.



Create a Team

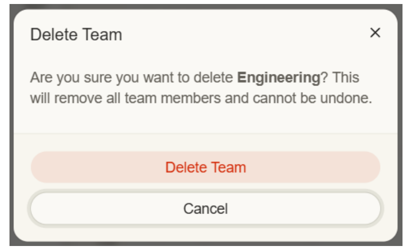


Follow these steps to create a Team in GridUnity.

1. Click the Create Team button.
2. Add a Team Name.
3. Add a description if needed.
4. Select the first team member, and select their Team Role (Team Admin, Finance Viewer, or Team Member).
   » Note: If you do not see a person on the list, check to see if that person has a member or affiliate account in your organization.
5. Use the Add member button to add additional team members.

» Please note: After creating a team, you must assign Roles to the team. Set Org Roles via User Menu > My Organization > Roles. Set Project Roles from within the desired project.

Delete a Team



1. Select the Team
2. Click Delete Team

Deleting a Team will remove accounts from the team and revoke role access that was assigned via that Team, but it will not affect member or affiliate accounts. Deleting a Team cannot be undone.

Setting Account Roles

GridUnity manages access through two types of roles: organization roles and project roles.

Organization role (Org Admin or Org Member): governs your company profile and shapes how much of the organization's shared access reaches you. Being an Org Admin gives you no project access by itself; you must be explicitly assigned a project-level role to view or edit an interconnection request.

Project role (Owner, Contributor, Viewer): dictates exactly what you can do on a specific project.

Appendix A: Organization and Account Planning Sheet

Use this to help plan your organization, member accounts, and affiliate accounts in GridUnity. This is a guide and is optional to use. Visit the Interconnection Process Guide page if you need help.

Organization: ______________________________

This is the name of the Interconnection Customer (IC) company that will submit the interconnection request.

Administrator Name: ______________________________

Administrator Email: ______________________________

This is the name and email of the person designated to be the system administrator for GridUnity.

People to Invite: Who needs access to this GridUnity organization?

- **Members:** An associate or employee of the organization
- **Affiliations:** A consultant or a consultant company of the organization

Roles on Invite: What type of access to GridUnity needs to be given?

- **Org Admin:** Read/write access. Can perform all functions in GridUnity, including inviting members and affiliates, revoking access, and assigning roles.
- **Org Member:** Can view all areas of GridUnity. Cannot change roles.

Invite Members: User Menu > My Organization > Members (invite employees)

Name	Email address	Admin or Member	Role

Invite Affiliates: User Menu > My Organization > Affiliations (invite consultants)

Name	Email address	Admin or Member	Role

Roles on Project Creation: For each project (IR) in GridUnity, who needs access?

Project Name: ______________________________

This is the project name of the Interconnection Request (IR) that will be submitted on behalf of the IC.

Name	Email address	Affiliate or Member	Role