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A PLANNING GUIDE FOR PLANT, NETWORK, RENEWABLE AND STORAGE OPERATORS

Power and Energy Assessment Preparation Without Risking the Plant

Generating plants, substations, solar and wind sites, battery systems and microgrids call for methods built around live equipment, and the preparation is where an assessment is shaped to fit them. This guide covers the decisions to make first, and (800) 868-8189 covers the rest.

Record the Facility, the Assets and the People Who Own Them

Identify the generating plant, the electric network assets, the renewable sites, the storage systems or the microgrid included in the request, and for each one record the site owner, the operator, the vendors and the engineering, operations and security contacts who can authorize work. Across a fleet those names change from site to site, the plant DCS belongs to one group and the substation gateways to another, and the scope has to follow the owners rather than the corporate structure. The artifact is a site list with an owner column for every control system on it, and the first thing an examiner checks is whether the DER fleet platform and its vendor appear on that list at all.

Choose the Operating Question

Describe whether the need concerns an assessment, a new integration, an open finding, vendor access, incident evidence or recovery, because each one produces a different record and a different evidence standard. Supply the existing summaries and action lists through an agreed exchange so the new work builds on what is already known instead of repeating it at your expense. An open finding from an earlier review that was closed on a vendor's assurance is a common place to start, and it is a better starting point than a fresh scan of the whole estate.

Prepare the Records the Assessment Will Draw On

Gather the available architecture, asset, network and supporting service records; the engineering and vendor access accounts, the gateways they pass through and the approvals behind them; the relevant control system, historian, site controller and fleet service interfaces; the configuration baselines, change records, backups and restoration evidence; and the incident responsibilities, logs, time sources and previous exercise results. For a substation that means the gateway and firewall rule exports with their dates, the relay settings repository and its last comparison against the installed relays, the engineering workstation inventory and the jump host session records. For a plant it means the DCS backup inventory, the record of the last actual restore and the OEM remote support contract.

An inventory of what exists and who holds it is enough for the first conversation. The inventory usually brings the familiar items forward: a vendor VPN that terminates inside the station network rather than at the jump host, a settings file awaiting its first comparison to the relay since commissioning, and a nightly backup ready

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for its first restore test. Listing them is the first corrective action.

Identify Specialist Responsibilities and Exclusions

Agree who provides plant, electrical, protection, OEM and integrator expertise, because the protection engineer confirms whether a reachable relay interface can change a setting, and the cyber assessor's evidence feeds that judgment. Set the operating windows, the sensitive assets, the allowed methods, the stop authority and the recovery arrangements before anything active is considered, and write them into the method. The written scope names any live equipment change, switching, failover test or protection setting change the operator approves, and the stop authority for each.

Establish the Requirements in Scope

For a NERC related assignment, the responsible entity supplies the applicable registration, the asset categorization, the requirement versions in force for the review period and the review period itself, and the evidence is organized around those facts rather than around a generic checklist. The applicability record is the first artifact an auditor reads, and the evidence is collected against the edition that binds the entity for the review period, which may be the prior edition rather than the newest one published. Distribution and distributed energy reviews may use DOE's sector guidance as an agreed criterion, and the report says that it is an agreed criterion rather than a legal requirement. New York utility IT audit work has its own scope, and each program is assessed on its own terms.

Start With the Facility and the Decision

Start with the facility type, the location, your role and the timing. Diagrams, credentials and incident records come later, once information handling is agreed for controlled records. Global Digital Forensics has worked with businesses since 1992, and a senior practitioner will walk through the scope with you at no charge.

Reviewed by Joseph Caruso, Founder, CEO and CTO, CISSP. Last reviewed November 3, 2026.

Start With a Free Consultation

The initial consultation is free, and requests are handled in confidence. On the first call a senior member of our team listens to the question you need answered, identifies the records and systems involved, and recommends the next step.

Call (800) 868-8189, answered 24/7, request a consultation at evestigate.com/contact, or email info@evestigate.com.

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