

Guide to the IESO Portal

IESO Training
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Guide to the IESO Portal

AN IESO TRAINING PUBLICATION

This guide has been prepared to assist in the IESO training of market participants and has been compiled from extracts from the market rules or documents posted on the web site of Ontario's Independent Electricity System Operator. Users of this guide are reminded that they remain responsible for complying with all of their obligations under the market rules and associated policies, standards and procedures relating to the subject matter of this guide, even if such obligations are not specifically referred to herein. While every effort has been made to ensure the provisions of this guide are accurate and up to date, users must be aware that the specific provisions of the market rules or particular document shall govern.

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1. Introduction

Some market participant interfaces and applications are integrated into a single, portal-based website.

This secure IESO Web Portal provides password management and a starting point to access IESO information and software applications.

You¹ can use the Portal to access the following different sites or ‘communities’:

- Submit and view settlement data via the Settlements community;
- View prudential information, retrieve confidential margin calls and margin call warnings, and submit an online Notification of Prepayment for a margin call payment via the Prudentials community;
- Access the Transmission Rights Auction (TRA) System via the Transmission Rights Auction community; and
- Access various collaboration community pages such as the SOE LDC Extranet, Emergency Preparedness, MACD Compliance Enforcement, Demand Response Settlements, RT-GCG Cost Recovery Framework and other applications to securely upload, share and revise documents; participate in online forums and discussions; and see project, task and calendar information.

The communities available to you through the Portal are dependent on the types of access that have been requested for your user account. Most system access requests are managed through the Online Registration System (Online IESO). For access to a collaboration community, please contact the IESO Steward of the Community or IESO Customer Relations.

¹ ‘You’ and ‘your’ mean the market participant. ‘We’, ‘us’ and ‘our’ mean the IESO.

2. Logging On To and Logging Off the Portal

You can log on to the Portal with a user ID and password. After completing your Portal session, you should always log off for security. Please see step 1 in section 2.2 for the URLs.

2.1 Accessing the Portal

When you are registered as an IESO system user, we provide you with a user account name (user ID) and temporary password to access the IESO Production Portal and the IESO Sandbox Portal (Production systems are used to interact with the IESO and the IESO administered markets; systems in the Sandbox are available for testing and training). The same production account is used to access the IESO Reports site, Online IESO, Energy Market Interface (EMI) and the Outage Management site. Please note that the Production Portal and Sandbox Portal passwords are not interchangeable.

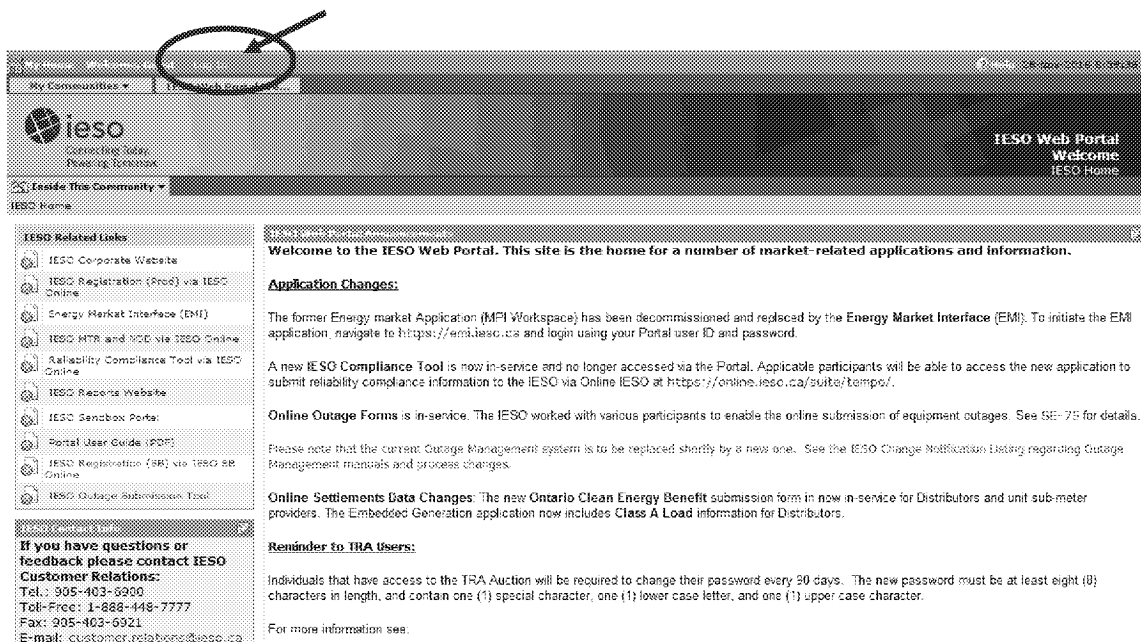
The first time you log on, you are prompted to change your temporary password to one known only to you. Be sure to choose a password you can remember. If you have forgotten your password, you can reset your password if you have completed your Security Profile (see section 2.3, page 6). For further assistance, please contact IESO Customer Relations.

Your password must follow these rules:

- Passwords must be eight characters or longer and should contain at least one of each of the following:
 - An upper-case character
 - A lower-case character
 - A number
 - A special character (**do not** use any of the following: ampersand (&), backslash (\), less than symbol (<), greater than symbol (>), single quote ('), or double quote (").)
- Do not include spaces in your password
- Keep in mind that the password is case sensitive. Turn off Caps Lock and Num Lock on your keyboard before typing.

2.2 Logging On With Your User ID and Password

Step 1: Go to the IESO Production Portal URL <https://portal.ieso.ca/>. (The Sandbox Portal URL is <https://portalsandbox.ieso.ca/>.) The **IESO Web Portal Welcome** page appears.



Step 2: Click on **Log In**.

The **Sign In** page appears:

Return to IESO Portal Welcome Page


 Power to Ontario. On Demand.

Sign In with User Account Name and Password
 Enter your User Account Name.

User Account Name:

Attention to Market Participants accessing the Transmission Rights Auction and Energy Market, Outage Management and Settlement Forms applications: This portal is owned and operated by the IESO, and all use of this portal is governed by the IESO's market rules. As a registered Market Participant, you have received a unique and confidential User Account and Password from the IESO to access this portal and you agree to maintain their confidentiality by sharing them with only your authorized representative(s). You specifically agree that you are exclusively responsible for all access to and any activity on this portal that occurs through the use of your User Account and Password. If you become aware of any unauthorized use of your User Account or Password, you agree to immediately notify the IESO. The IESO is not liable for any loss or damage arising from any unauthorized access or use of your User Account and Password. If you do not agree with these terms and conditions, do not login to this portal and immediately advise the IESO.

Forgot your password?
 Enter your user ID (Account Name) and click the forgot password link on the next screen

Not a registered user?
 Ask your Organization's Rights Administrator to register you in Online IESO

[Other questions?](#)

Copyright IESO 2013. Contact the IESO Portal Administrator for technical questions or feedback.

Step 3: Read the legal terms on the page and then enter your **User Account Name**. Click the **Continue** button to accept the terms.

Step 4: You will advance to the next **Sign In** screen. The first time you visit this page, you will see an image with a time stamp. It should show the current date and time. After setting up your Security Profile, you should only type if you see the personal image and phrase you have chosen, along with the time stamp. Type in your password and click **enter**.



The screenshot shows the IESO Sign In page. At the top is the IESO logo with the tagline "Power to Ontario. On Demand." Below this, the text "Sign In:" is followed by the instruction "Please type your password and then click on the 'enter' button." A password input field is shown with a placeholder "Password:". Below the field is a smaller IESO logo with the tagline "Power to Ontario. On Demand." and the text "1801/2013 12/12 TEST". At the bottom of the input field is an "enter" button. Below the input field, the text "What's this?" and "forgot your password?" are visible.

If you have typed in a temporary password, the system will continue to the **Reset Your Password** screen. When creating a new password, choose one that meets the criteria provided on the page. It should be easy for you to remember, but difficult for anyone else to guess. It is good practice to avoid dictionary words in any language and to use a combination of upper case and lower case letters, numbers and symbols.

If you are prompted to change your password, follow these steps:

1. Enter the temporary password provided to you and click **enter**.
2. Type a new password and click **enter**.
3. Re-type your new password and click **enter** to complete the set-up.
4. If you have previously completed your **Security Profile** (see section 2.3, below), you may be asked a security question to confirm your identity.

Reset Your Password

Please type your old password below and click "enter". You will then be able to create a new password. Type new password and click "enter", then type it again and click "enter" to confirm your password and continue your log-in.

Choose a new password that is easy to remember and meets these password rules:

- Case sensitive (The "Caps Lock" key should be off)
- Eight characters or longer
- Contains all of the following three types:
 - upper-case
 - lower-case
 - special character [NOTE - Do not use the following special characters in your password: & (ampersand), \ (backslash), < (less than sign), > (greater than sign), ' (single quote), " (double quote).]
- Includes no spaces
- Please make sure the "Num Lock" key is off

Old Password

click to type

New Password

click to type

Confirm New Password

click to type



2.3 Your Security Profile

Set Up Your Security Profile

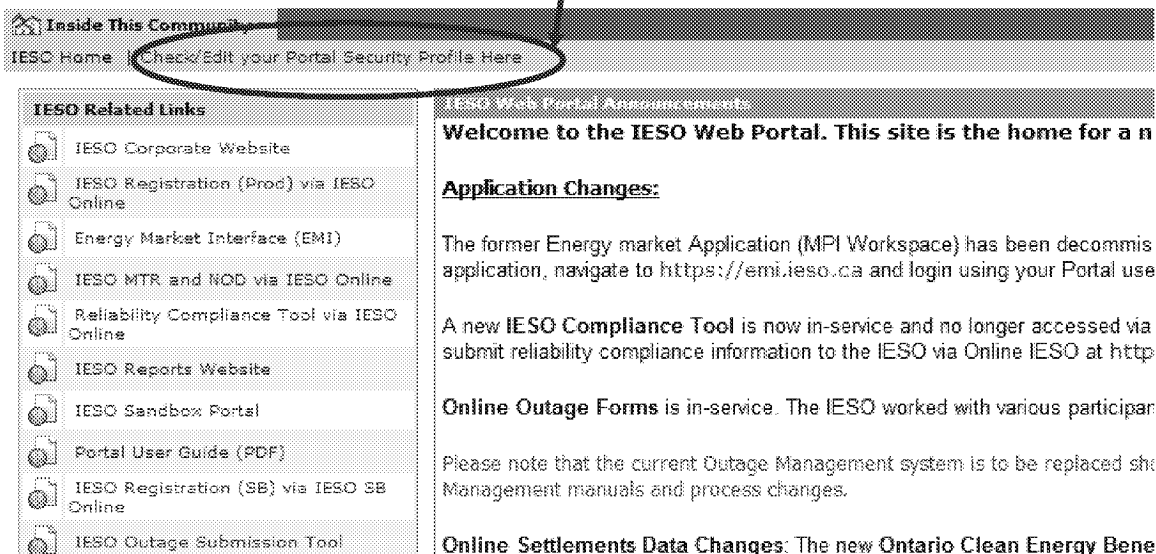
The first time you sign in to your account, you will be asked to set up your Security Profile (you can only skip this step once). There are two steps:

1. Choose the personal image and phrase that will be presented to you each time you are asked to enter your password or answer a security question,
2. Select five security questions and provide an answer for each. These will be used by the system to verify your identity as necessary. Although you can choose new questions and answers in the future, a record of the answers you enter cannot be retrieved, by you or by IESO staff. No IESO employee will ever know or ask for your security questions and answers.

Follow the steps on the page to complete your **Security Profile**.

Manage Your Security Profile

You can update your security settings at any time after logging in to IESO Portal. To begin, click on **Check/Edit your Portal Security Profile Here** at the top of your Portal page:



The **Security Profile** page provides all the links needed to make changes to your

- personal image and phrase
- security questions and answers
- password

Follow the steps provided on the screens to complete each task.

Personal image and phrase preferences

This is your personal image and phrase combination. To change it, click on "Get a new image and phrase". You may repeat this until you have an image and phrase you like. To keep this new image and phrase, simply leave the page.

You may also click on links below to reset your questions and answers or to change your password.



Learn more about your device

Get a new image and phrase

Reset your challenge questions and answers

Change your password

To change your personal image and phrase

The personal image and phrase preferences can be changed by clicking on **Get a new image and phrase**. Each time you click, the combination shown on your screen will change. When you see one you like, stop clicking on **Get a new image and phrase** and your selection will be saved. From now on you will see this new personal image and phrase when you complete security profile tasks.

To change your questions and answers

On the Security Profile page, click on **Reset your questions and answers**. You should see the personal image and phrase that you last selected appear on the Security Questions page.

Click on the drop-down list provided for question number 1 and select a question from the options presented. To provide your secret answer, type it in the box showing your personal image and phrase.

Choose an answer that will be easy for you to remember but very difficult for anyone else to guess or discover. The answer is not case sensitive but it must contain at least four characters. Please do not reveal this information to anyone else and remember that IESO employees will not be able to see your answers and they will never ask you to reveal them for any purpose.

After typing your answer and ensuring that you are satisfied, click **enter**.

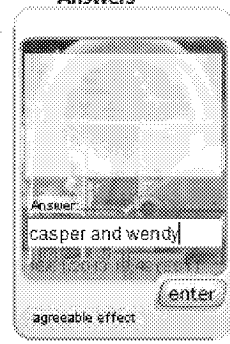
Security Questions

Your chosen security questions and answers will be used whenever it is necessary to confirm your account identity. To complete this step, click on a question from the randomly generated drop-down list. Choose questions with answers that will be easy for you to remember but very difficult for others to guess or discover. Type the answer (they are not case sensitive) after you are sure you are seeing your personal image and phrase. Click "enter" to choose the next question.

Questions (Choose a question from each set of choices below)

- What is the first name of your closest childhood friend?
- Select One
- Select One
- Select One
- Select One

Answers



Continue with the next questions, until all five questions and answers are entered.

Security Questions

Your chosen security questions and answers will be used whenever it is necessary to confirm your account identity. To complete this step, click on a question from the randomly generated drop-down list. Choose questions with answers that will be easy for you to remember but very difficult for others to guess or discover. Type the answer (they are not case sensitive) after you are sure you are seeing your personal image and phrase. Click "enter" to choose the next question.

Questions (Choose a question from each set of choices below)

- What is the first name of your closest childhood friend?
- What is your spouse's nickname?
- Select One
- Select One
- Select One

Answers



To change your password

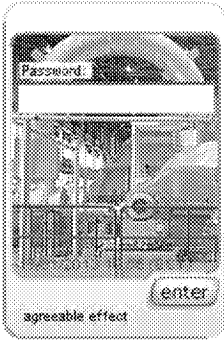
On the **Security Profile** page, click **Change your password**. You should now see your personal image and phrase appear on the **Change your Password** page:

Change Your Password

Please choose a new password that is easy to remember and meets these password rules:

- Case sensitive (The "Caps Lock" key should be off)
- Eight characters or longer
- Contains all of the following three types:
 - upper-case
 - lower-case
 - special character [NOTE - Do not use the following special characters in your password: & (ampersand), \ (backslash), < (less than sign), > (greater than sign), ' (single quote), " (double quote).]
- Includes no spaces
- Please make sure the "Num Lock" key is off

Old Password	click to type
New Password	click to type
Confirm New Password	click to type



agreeable effect

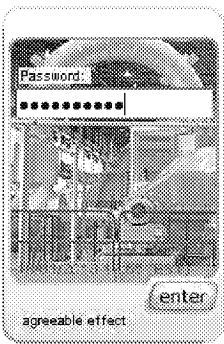
If you see the personal image and phrase that you most recently selected, type your current password and click enter. The step will now be shown as **Completed**:

Change Your Password

Please choose a new password that is easy to remember and meets these password rules:

- Case sensitive (The "Caps Lock" key should be off)
- Eight characters or longer
- Contains all of the following three types:
 - upper-case
 - lower-case
 - special character [NOTE - Do not use the following special characters in your password: & (ampersand), \ (backslash), < (less than sign), > (greater than sign), ' (single quote), " (double quote).]
- Includes no spaces
- Please make sure the "Num Lock" key is off

Old Password	Completed
New Password	click to type
Confirm New Password	click to type



agreeable effect

Continue by typing the new password you want to create, following the password rules provided on the screen. Click on the **enter** button and then re-type the new password to

confirm it and click on the **enter** button. All three steps will show as **Completed**. Please wait a few seconds for the password change to take effect. It is also recommended to close all browsers and open a new browser to log back into the Portal after a password change.

Depending on security conditions, you may also be asked one of your security questions. These will be presented to you in combination with your personal image and phrase. Type your secret answer and click on the **enter** button:

To confirm your account credentials, type in the answer to the following security question and then click on "enter" button.

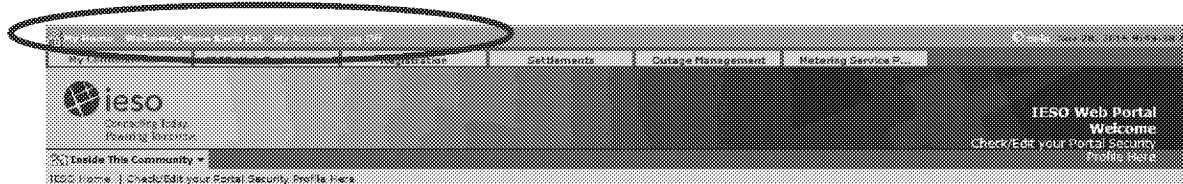


The image shows a security question interface. At the top, it asks "What is your spouse's nickname?". Below the question is a text input field containing the word "brooklyn". To the right of the input field is a button labeled "enter". At the bottom left of the interface, it says "agreeable effect".

2.4 After Logging In

When you have successfully logged in, you will see your name displayed in the upper left-hand corner of the Portal window (e.g. “Welcome Lastname Firstname”).

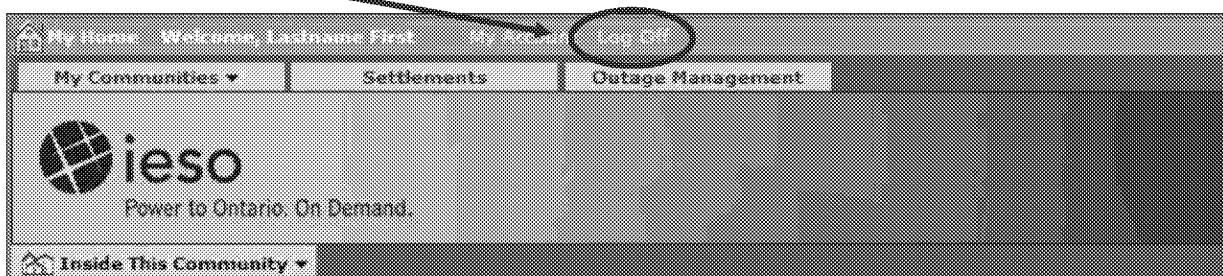
You will also see tab buttons for your applications and/or communities. Click on the application or community tab that you want to use.



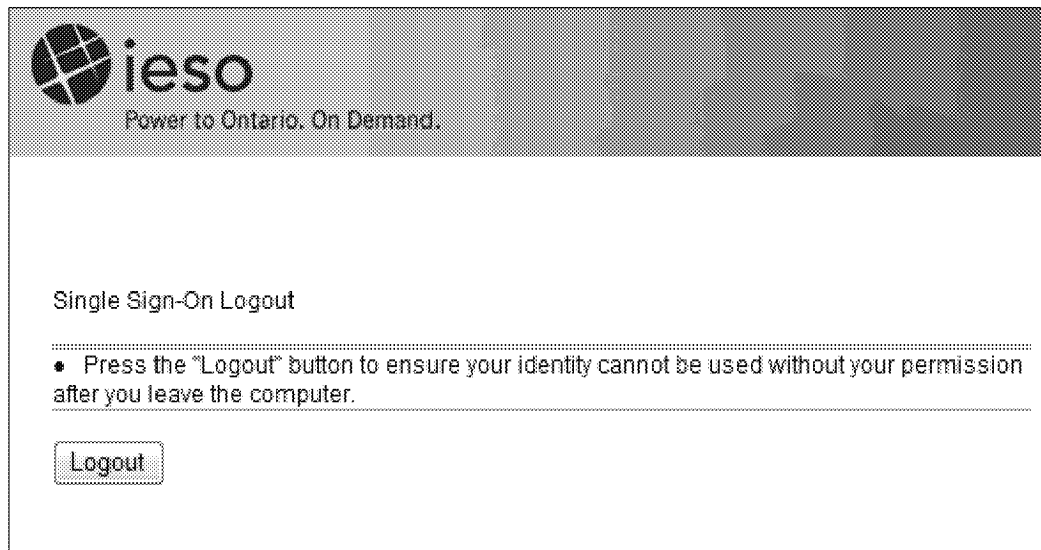
2.5 Logging Off

Always log off when you have finished a Portal session. If you don't log off, you will stay connected to the system and your security may be at risk.

Step 1: Click on **Log Off** at the top of the Portal window.



Step 2: A new web page will appear. Click on the **Logout** button.



3. Tool Finder Quick Reference

3.1 Inside the IESO Portal

Tool Name (alpha order)	Required Tab (Community)	For More Information
Collaboration Community	By Community name, e.g. MACD-TFE Community Go to Section 7, page 23	Contact your IESO Collaboration Community administrator
Prudential Manager	Prudentials Go to Section 5, page 19	IESO Training webpage: Guide to Prudentials at IESO
Settlement Data Forms	Settlements Go to Section 4, page 16	IESO Training webpage: Guide to Online Data Submission via the IESO Portal
Transmission Rights Auction	TRA Go to Section 6, page 21	IMO GDE 0004 Transmission Rights Auction System – Market Participant User Guide

3.2 Other IESO Systems

Tool Name (alpha order)	Link	For More Information
Energy Market Interface (EMI)	Production: https://emi.ieso.ca Sandbox:	http://www.ieso.ca/sector-participants/technical-interfaces

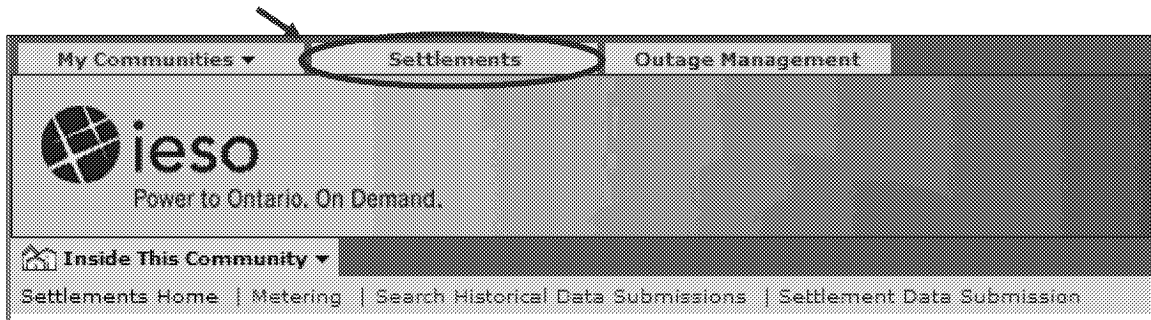
	https://emisandbox.ieso.ca	
Tool Name (alpha order)	Link	For More Information
IESO Private Reports Site	Production: https://reports.ieso.ca/private/ Sandbox: https://reports-sandbox.ieso.ca/private/	http://www.ieso.ca/sector-participants/technical-interfaces
Meter Data	Meter Data Profile set-up in Online IESO Meter Data Retrieval in IESO Reports Site	Meter Data Distribution User Manual
Meter Trouble Report (MTR)	Available in Online IESO	Currently no guide available.
Notice of Disagreement (NoD)	Available in Online IESO	http://www.ieso.ca/-/media/files/ieso/document-library/registration/online-ieso/managing_notice_of_disagreement.pdf?la=en
Online IESO	Production: https://online.ieso.ca Sandbox: https://onlinesandbox.ieso.ca	http://www.ieso.ca/sector-participants/registration/online-ieso
Outage Management	Production: https://outages.ieso.ca Sandbox: https://outages-sbx.ieso.ca	Outage Coordination and Scheduling System (OCSS) CROW Web Client User Guide

Tool Name (alpha order)	Link	For More Information
Prudential Support Submission	Available in Online IESO	http://www.ieso.ca/-/media/files/ieso/document-library/registration/online-ieso/submitting_prudential_support.pdf?la=en
Reliability Compliance Tool	Available in Online IESO	Currently no guide available.

4. Submitting and Viewing Settlement Data via the Settlements Community

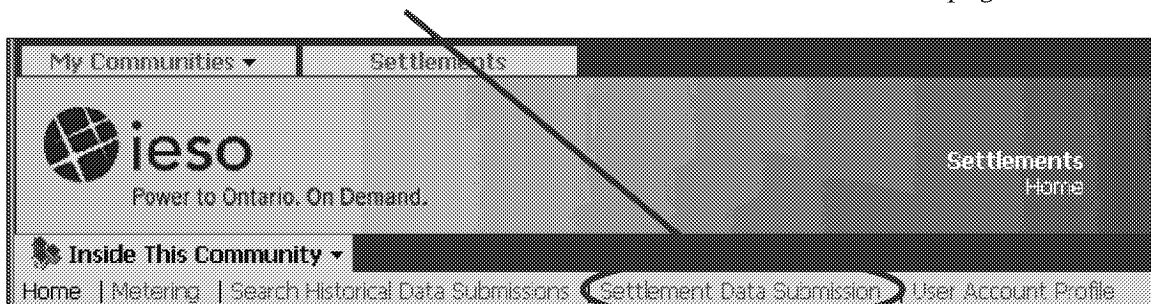
Forms required for sending settlement data to us are filled in and submitted via the Settlements community. It is also possible to view summary reports of your past submissions.

Log on to the Portal with your user ID and password, following the steps in Section 2.1. Click on the **Settlements** tab to access the Settlements community.



4.1 Submit Settlement Data

Step 1: Click on **Settlement Data Submission** on the **Settlements** home page.



The **Settlement Data Submission** page appears.

Settlements Online Form Submission

Select a market participant name and type of data for submission

Market Participant Name:

POWERCORP

Settlement Period:

Current

Data Submission:

- Regulated Price Plan vs. Market Price - Variance for Conventional Meters
- Regulated Price Plan vs. Market Price - Variance for Smart Meters
- Retailer Payments for Contract Price vs. HOEP for Regulated Consumers with a Retail Contract
- Regulated Price Plan - Final Variance Settlement Amount
- Embedded Generation and Class A Load Information
- Licensed Distributor Claims for the Renewable Energy Standard Offer Program
- Embedded Distributor Claims for the Renewable Energy Standard Offer Program
- OPG Rebate Returned to IESO
- Submission of Transmission Service Charges for Embedded Generation
- Hydroelectric Contract Initiative
- Feed-In Tariff Program - LDC
- Feed-In Tariff Program - Embedded LDC
- Ontario Clean Energy Benefit (-10%) - LDC

Go

Help button

Step 2: The name of your company appears in the **Market Participant** field.

If you have access to settlements data for more than one company, click the drop-down arrow to see a list of these Market Participants – you do not have to log on separately to view each company's data.

You can select **Previous**, **Current** or **Next** from the **Settlement Period** drop-down menu:

Current

Previous

Current

Next

To access the Data Submission form you wish to submit, scroll through the choices in the **Data Submission** box and click on the submission name. When the correct form is highlighted, click the **Go** button to open the submission page. Click the **Help** button for detailed instructions on specific screens.

For further instructions on completing the various Settlements submissions, please see the IESO Training guide, [Guide to Online Data Submission via the IESO Portal](#).

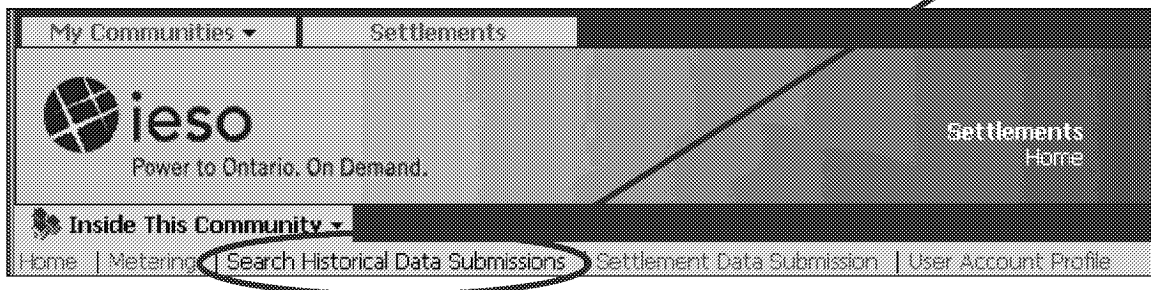
Step 3: Logging Off

Be sure to log off Portal when you have finished your session. If you don't log off, you will stay connected to the portal (when leaving Internet Explorer browser running). For improved security, we recommend that you always log off Portal when you finish your session.

Timing Out: Your session will timeout if it has not been used for 120 minutes. The maximum connection time for a session is 12 hours, after which the system will require login again.

4.2 View Previously Submitted Settlement Data

Step 1: To view data that has been previously provided to us, click on **Search Historical Data Submissions** within the Settlements community.



Step 2: The name of your company appears in the **Market Participant** field.

If you have access to settlements data for more than one company, click the drop-down arrow to see a list of these Market Participants. You can then choose which Market Participant's data you wish to access – you do not have to log on separately to view each company's data.

Step 3: Select the required data entry screen and date range to view previously submitted data. Click the **Help** button for detailed instructions.

Step 4: Logging off

Be sure to log off when you have finished your session. If you don't log off, you will stay connected to Portal (when leaving Internet Explorer Browser running). For improved security, we recommend that you always log off when you finish your session.

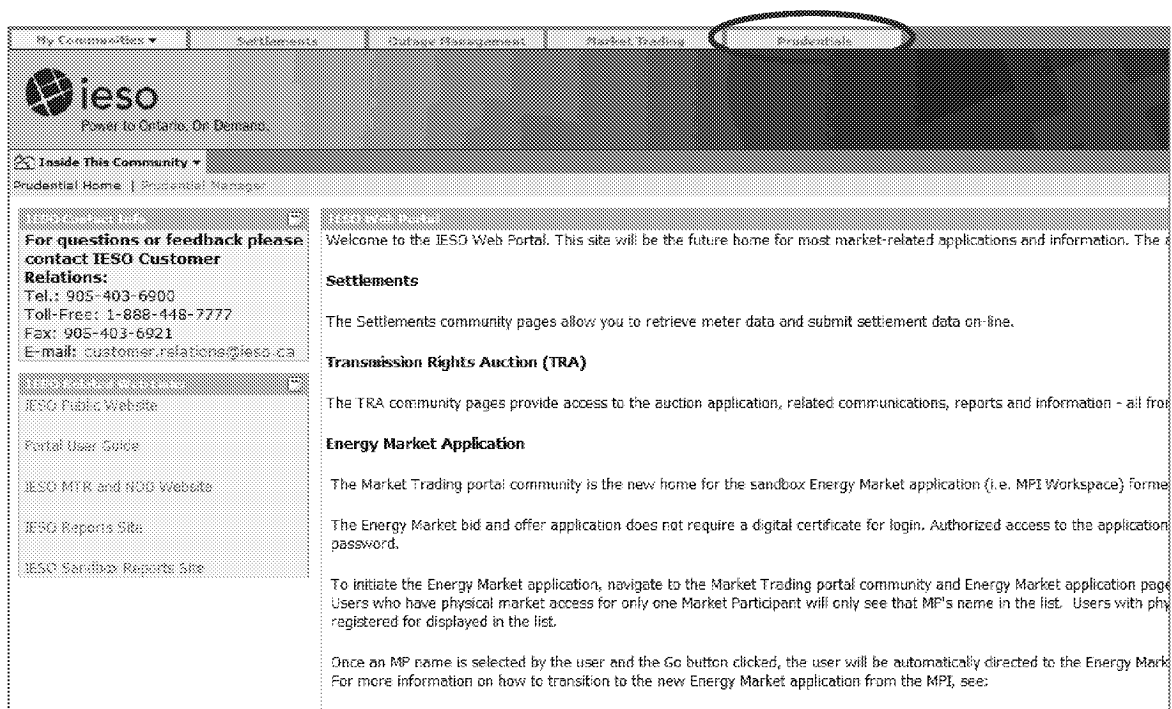
Timing out: Your session times out after 120 minutes of not being used. The maximum connection time for a session is 12 hours, after which the system will require login again.

5. Accessing the Prudential Manager

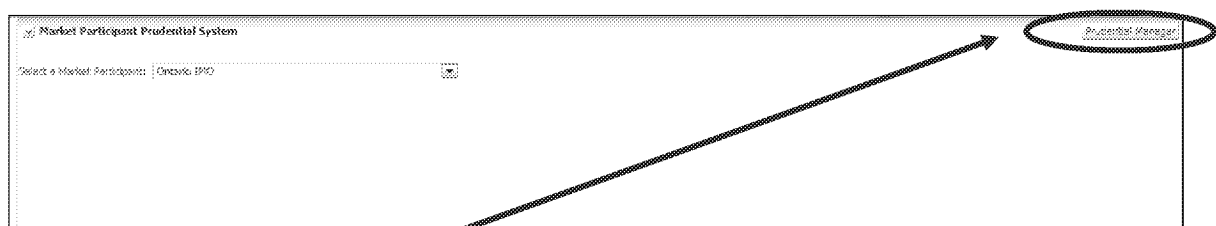
The Prudential Manager allows you to

- view prudential information such as daily estimated net exposure,
- retrieve confidential margin calls and margin call warnings, and
- submit an online Notification of Prepayment for a margin call payment;

Step 1: Log on to Portal with your User ID and Password, following the steps in Section 2.1. Select the **Prudentials** community and click on **Prudential Manager**.



Step 2: Select the company name you wish to access from the **Select a Market Participant** drop-down list. If you only have access to the information for one market participant, you will only see one option in the drop-down menu:



Click on the **Prudential Manager** button to access the system.

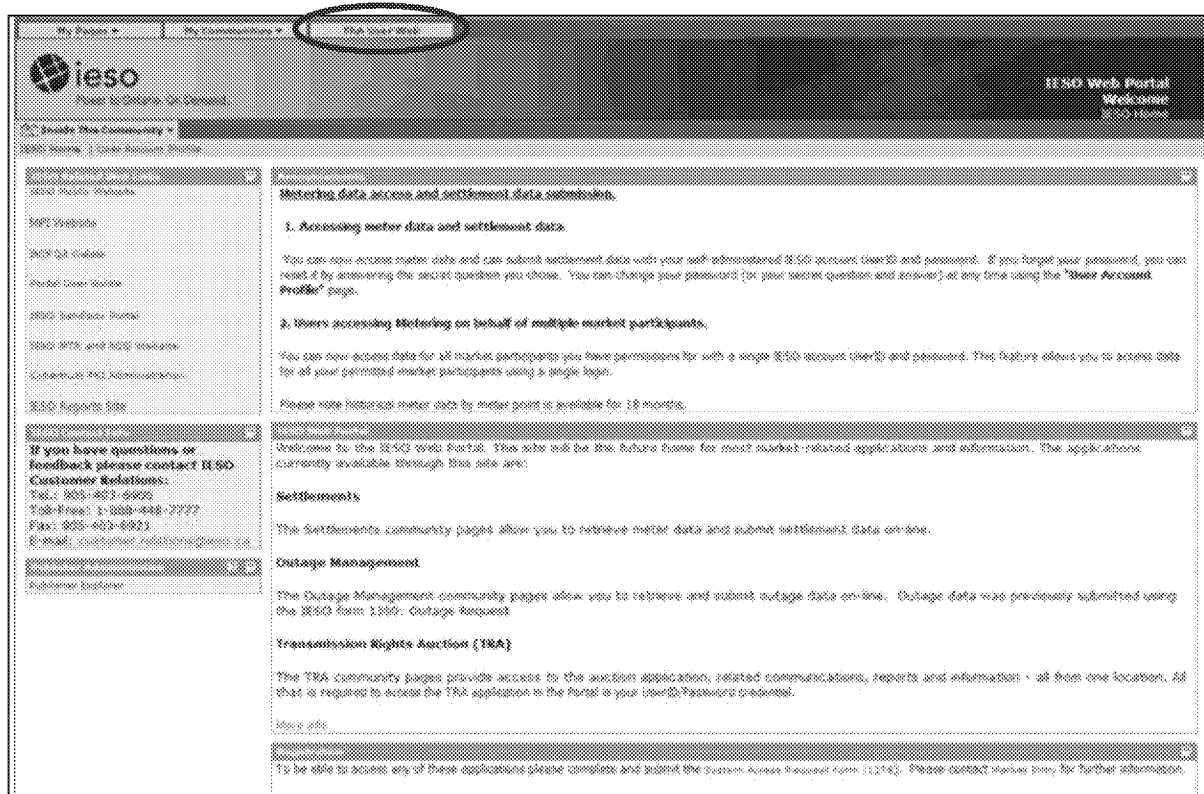
Step 3: Logging off

In your browser, close all Prudential Manager tabs that you have opened during your session. Be sure to log off Portal when you have finished your session. If you don't log off, you will stay connected to the Portal. For improved security, we recommend that you always log off Portal when you finish your session.

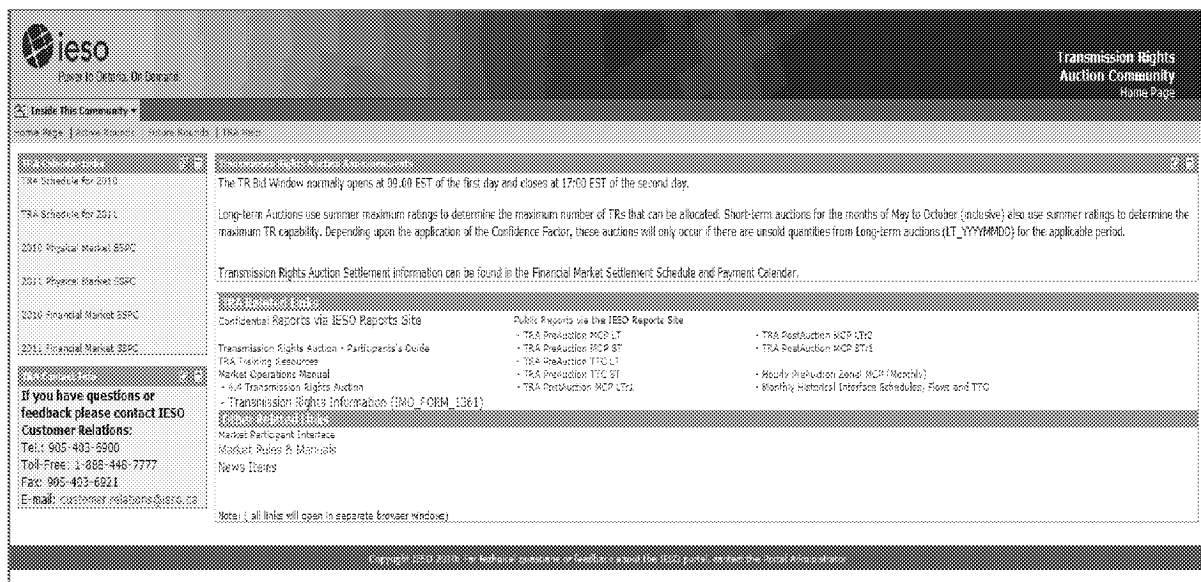
6. Accessing the Transmission Rights Auction System

Authorized Transmission Rights (TR) participants can access the Transmission Rights Auction (TRA) System via the TRA community to view future auctions and to bid in current TR auctions.

Step 1: Log on to Portal with your user ID and password, following the steps in Section 2.1. Select the **TRA** community.

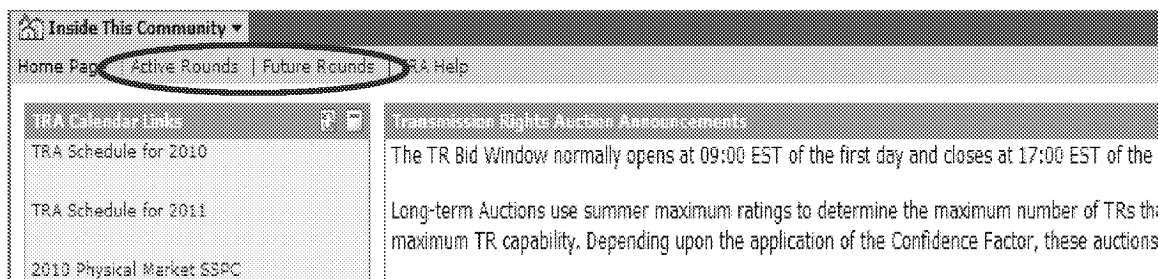


Step 2: The **Transmission Rights Auction Community Home Page** will open.



Step 3: To enter or revise an auction bid in a current auction, click on **Active Rounds**. To view information related to upcoming auctions, click on **Future Rounds**.

For additional information on using the System, see the [Transmission Rights Auction System Market Participant's Guide](#) available on the [Technical Interfaces](#) web page.



Step 4: Logging off

Be sure to log off when you have finished your session. If you don't log off, you will stay connected to Portal (when leaving Internet Explorer Browser running). For improved security, we recommend that you always log off when you finish your session.

Timing out: Your session times out after 120 minutes of not being used. The maximum connection time for a session is 12 hours, after which the system will require login again.

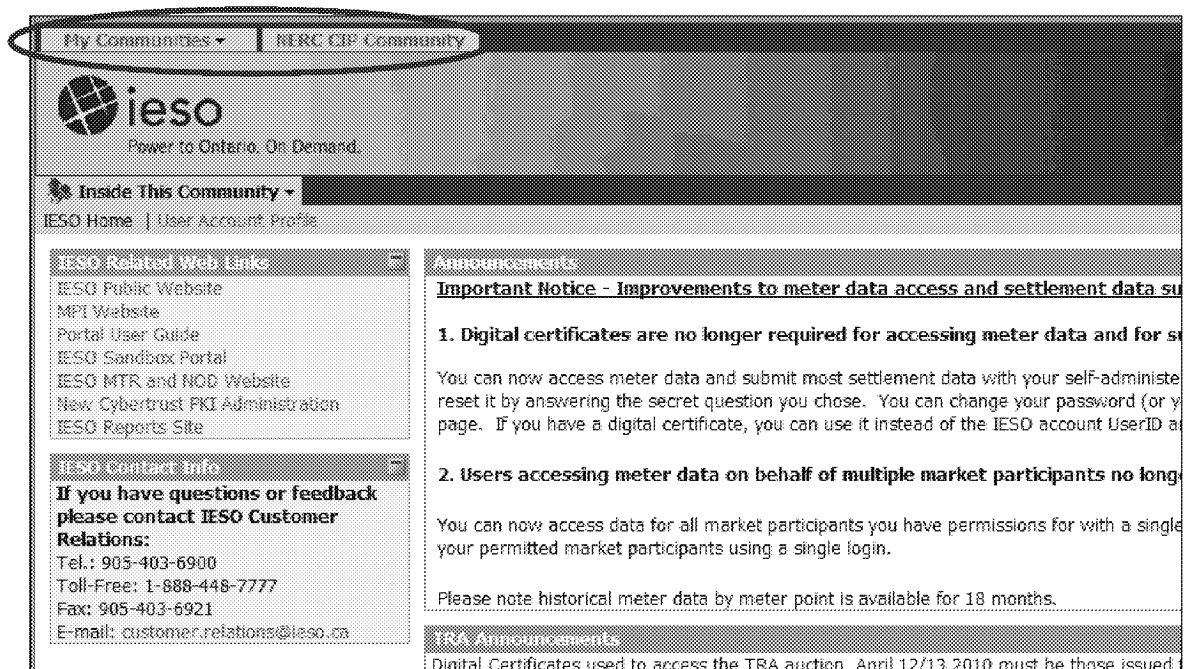
7. Accessing IESO Collaboration Community Pages

Collaboration communities provide you with access, as required, to collaboration community pages and applications to securely upload, share and revise documents; participate in online forums and discussions; and to see project, task and calendar information.

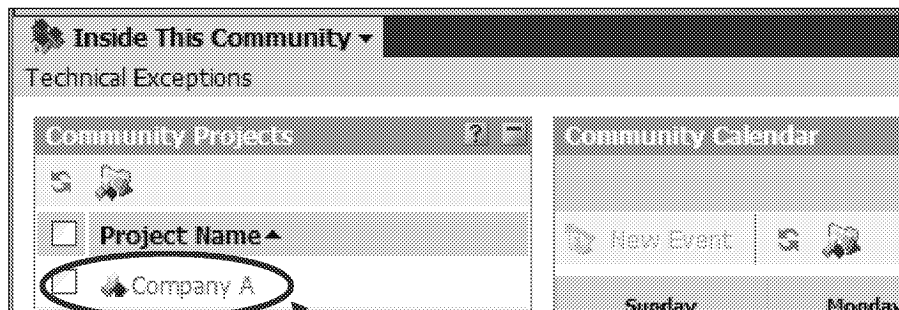
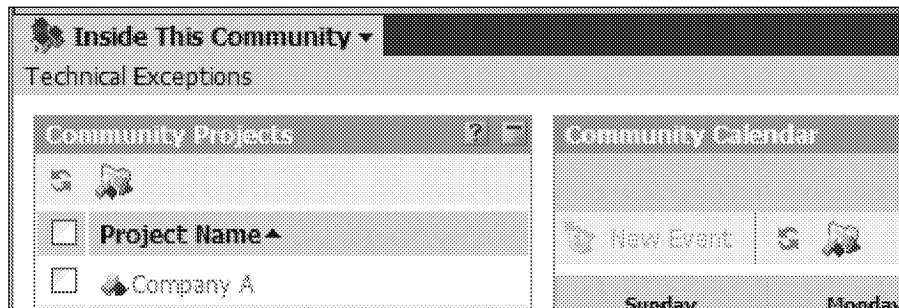
Note: This section uses the NERC CIP Collaboration Community as an example. Other collaboration community pages are similar, but may include different features depending on the community needs.

Step 1: Log on to the Portal with your User ID and Password, following the steps in Section 2.1.

Step 2: Select the Community tab for the collaboration community you wish to access; in this example, the **NERC CIP Community**. You can also view your communities in the **My Communities** drop-down menu.

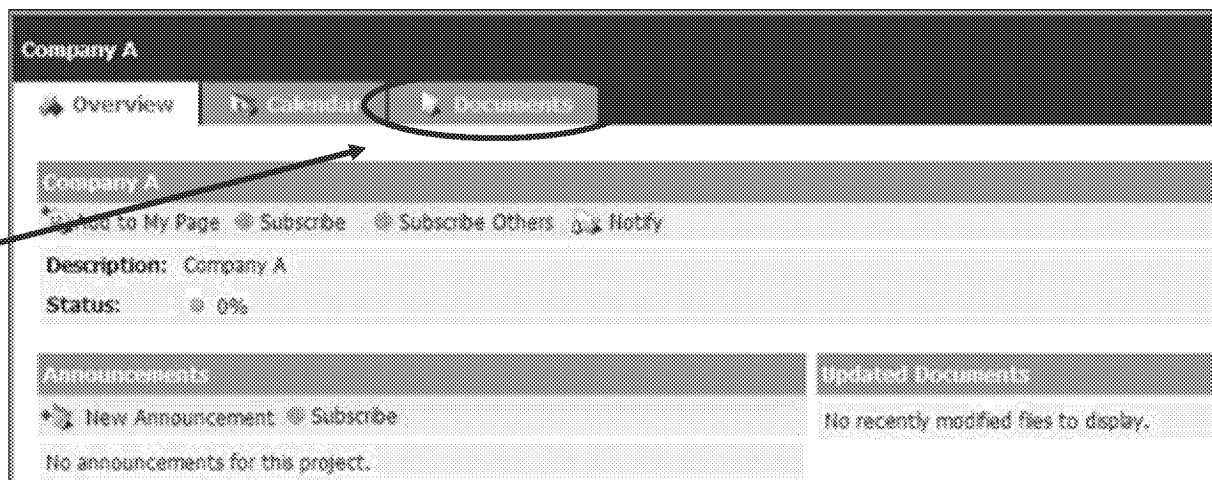


Step 3: You will now be able to view various options within the collaboration community. Here, you can see the community page **Technical Exceptions** with **Community Projects** links and a **Community Calendar**.



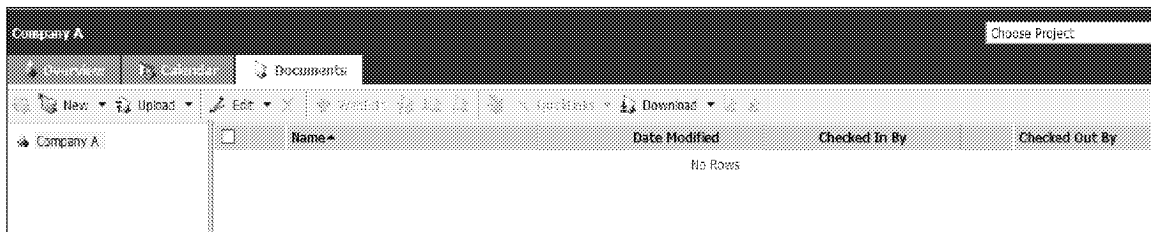
Step 4: Click on your **company name** to access content for your company.

A new pop-up page will appear with **Overview**, **Calendar** and **Documents** tabs. The **Overview** page is the default.

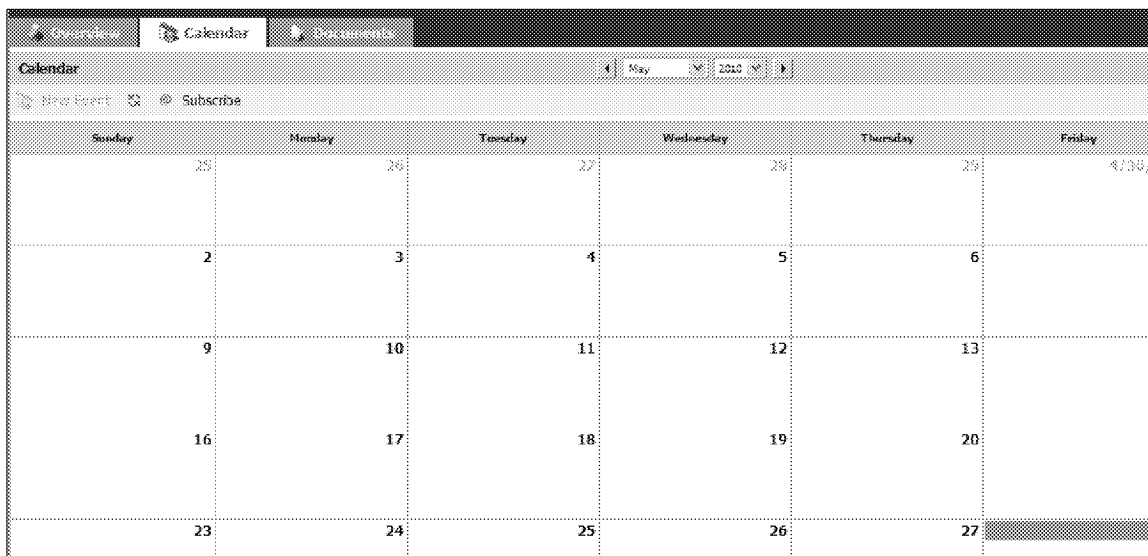


Step 5: Click on **Documents** tab to access the documents page for uploading or downloading shared documents.

Any shared documents will be displayed in the list with **Name**, **Date Modified**, who checked it in and who has it checked out.



Step 6: Click on the **Calendar** tab to access the calendar page for viewing any scheduled events or tasks.



For more information about using a particular collaboration community, please contact your IESO collaboration community administrator.

Step 7: Logging off

Be sure to log off when you have finished your session. If you don't log off, you will stay connected to Portal (when leaving Internet Explorer Browser running). For improved security, we recommend that you always log off when you finish your session.

Timing out: Your session times out after 120 minutes of not being used. The maximum connection time for a session is 12 hours, after which the system will require login again.

8. Troubleshooting

If you have an IESO Portal account and you are having problems logging into the Portal, please ensure the following are in place before contacting IESO Customer Relations:

- Please use the 'Log In' link directly from our website <https://portal.ieso.ca> – do not use a bookmarked page for the page where you are required to put your login ID in. The same security system is used for multiple application systems and it needs to know what website you are trying to login to so it can redirect you back to it after you have entered your user ID and password.
- Ensure that you are using the [IESO supported browser and operating system](#).
- Always enter your username (user ID) in lower case letters.
- Ensure that you do not have CapsLock or NumLock turned on.
- If you are unable to access an application within the Portal, please check with your Applicant Representative or Rights Administrator to ensure that you were registered to access the application.

If all requirements mentioned above are in place and you are still having problems, please send a screen shot of the error you are receiving to customer.relations@ieso.ca

For more information or assistance, please contact IESO Customer Relations:

Telephone (905) 403-6900

Toll Free 1-888-448-7777

customer.relations@ieso.ca

www.ieso.ca