Portal Replacement Project / IESO Gateway FAQ

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What is the Portal Replacement Project about?

The Portal Replacement project, also known as the external identity management project is being done to replace the Oracle and internal Active Directory based IESO Identity Management solution (and the IESO Portal) which are used for authentication and authorization services for the IESO Portal, its Collaboration communities, the Confidential Reports site (IESO Reports Site), as well as; Energy Market Interface system for Entering *bids/offers*, OCCS CROW Outage Management system, Dispatch Services system, Transmission Rights Auction system via the Portal, Prudential Manager Application via the Portal, plus all Online IESO Applications: Registration Automation System – Manage organization registration and participant authorization , Facility registration and Meter Installation processes, Notice of Disagreement (NOD), Meter Trouble Report (MTR), Meter Data Management (MDM) , Prudential System, Demand Response Auction, Reliability Compliance Tool, Enable Capacity Export, Online Settlement Forms, Audit Revenue Metering Installation, DR Metering Audit, Manage Contributor, Non-Compliance Report, CDM Plan and Measures, Retrofit.

A new cloud-based Okta authentication system will be used instead for all market facing applications with all new user accounts and include improved multifactor authentication options and better self-service for user accounts and password recovery.

Where will the Webinars on the project be published?

The IESO has published the recorded webinars on the corporate website on the Participant Tool Training page at:

https://www.ieso.ca/en/Sector-Participants/Market-Operations/Marketplace-Training/Participant-Tool-Training

What is the IESO Gateway?

The IESO Gateway is the Okta based web system that will be used to let end users navigate to and then authenticate user account logins for all the web applications listed above. This includes a landing page and user dashboard where icon based tiles with links representing the IESO market facing applications will be displayed for managing access to those applications. A separate IESO Gateway URL exists for the Sandbox environment and the Production environment. Users will only see application tiles for those system they have registered entitlements for. The Reports sites' (production and sandbox) access will not be accessible through the IESO Gateway and will remain as they are although they will use the new Okta based authentication and accounts.

What are the timelines for the Portal Replacement Project?

The existing Portal Collaboration tool's communities are currently finishing migration to the IESO Workspace tool which went line in May. All collaboration communities being migrated are expected to be moved into IESO Workspaces by the end of August. The market facing applications migration and implementation timeline is as shown below:

Starting July 15	Week of July 19	Starting August 09	Starting Aug 19	Sept 14, 15, 16
Sandbox Account Activation	Webinars to MPs, LDCs, SPs	Sandbox Market Trials	Production Account Activation	Production Cutover - Release 46.0 Market Facing Category 2 & 3

The Sandbox Gateway was live in July for account activation, applications were available the August 9th. In the Production environment, the IESO Gateway is live now for the IESO Workspaces and the Fit-microFIT email based accounts. UserID based accounts for Market facing applications were issued August 19th and those applications will be available via the Gateway during the week of September 13th.

For the cutover times for Sandbox and Production, the IESO has and will be issuing implementation information and outage times for August 9th and September 14th, 15th and 16th.

Confidential Reports site will be switched over on the 14th; OCSS CROW Outage Management system on the 15th and then Online IESO applications, Energy Market Interface, Dispatch Services, Transmission Rights Auction and Prudential Manager on the 16th.

What URL changes will be happening for market facing GUI applications?

The existing market facing GUI application URLS are for the most part not changing although for convenience all applications except the Confidential Reports site will be available via the IESO Gateway.

For the Sandbox environment at: https://gateway-sbx.ieso.ca

and for the Production environment at: https://gateway.ieso.ca.

However, the Portal will be decommissioned after go live of the IESO Gateway and the TRA application and Prudential Manager will be made accessible via the Gateway. Navigation to an existing application URL (e.g. https://emi.ieso.ca) will, after go-live, prompt the end user to login with their IESO Gateway account.

What URL changes will be happening for market facing application Web Services?

Application web services for EMI, Dispatch and OCSS will continue with their existing URL's.

On the implementation days for Sandbox and Production the web services will be cutover to new IESO Gateway API credentials for each environment. It is up to API custodians to ensure that they have activated the respective Gateway API accounts before each implementation day so that the cutover is transparent.

What user accounts are impacted and what accounts are not impacted?

Essentially all existing sandbox and production accounts based on the IESO Active Directory systems are impacted. New replacement Okta based IESO Gateway accounts for both environments will be created with the same login usernames (e.g. a current 'smithb' account will be replaced with a new 'smithb' account). This includes person and API (machine) user accounts.

Separate email-based username accounts for use with IESO Workspaces have already been created and distributed to Collaboration users. The IESO Workspaces application replaces all Portal Collaboration communities such as LDC Extranet, MACD Compliance Monitoring and MACD Compliance Enforcement.

How do I get a replacement user account?

The IESO, based on the IESO Registration system, has all the registered user accounts that need to be replaced for Sandbox and Production and the IESO has issued them for existing registered users. Upon creation of new IESO Gateway user accounts by the IESO, the sandbox and production environments during July (15th) and August (19th) issued email notifications to all end users to enable them to activate their accounts. Typically, this took a day or two. The email addresses used for notifications were based on those defined in the IESO Registration system. It is important that registered emails for user accounts be up to date. Any new user account registrations in Online IESO

for Sandbox will trigger automated provisioning and activation emails now. The same will hold true for production after September 16th.

How long do I have to activate my new user account?

End users have up to 90 days to activate their new IESO Gateway accounts. It is recommended that end users activate their new accounts ASAP to verify they have been setup and can access the corresponding IESO Gateway system (Sandbox or Production). Applications were made available in Sandbox via its Gateway URL on the August 9 and in September the applications will be made available over the September 14 – 16th cutover dates. End users can reference the new IESO Gateway User Guide available on the IESO corporate website for instructions on activating their accounts.

It is recommended that end users during activation of their new IESO Gateway accounts setup passwords that are the same as their current IESO Portal accounts for ease of transition. This is especially true for API accounts which are used programmatically by Market Participants with application web services for the EMI, IESO Reports Site, Dispatch and OCSS Outage Management systems. This ensures that on the day of cutover to the IESO Gateway authentication system the switch is transparent for Market Participants.

How do I confirm my new Gateway account works?

Activating the account permits the end user to login to the respective IESO Gateway in the process and see the Gateway dashboard. The applications the end user is registered for in Sandbox are available now.

In production, applications will not be shown to the end user until the respective implementation day in September for each application although all IESO Workspaces user accounts which are email address based (instead of UserID) work now in production.

What if a replacement user account is not issued to me?

Gateway account activation emails sent in July for Sandbox were based on email addresses in the Sandbox Online IESO Registration system. It is entirely possible that the IESO has missed some accounts needing to be replaced or it is very likely that a market participant has not kept the user

account email addresses up to date where they have made an email domain change. For example, API accounts have custodians and in many cases those people may no longer be with the participant organization. It's also possible spam filters have prevented the end user from receiving the new account activation email notification. Contact your organization's Information Security team to ensure the IESO's activation email is not filtered by corporate firewalls, spam filters, etc.

So it is likely that a number of registered Sandbox users have not received Sandbox activation emails because of this and authorized representatives primary contacts should make sure in Sandbox Online IESO Registration that email addresses are up to date and correct where. This includes custodian information for API (machine) accounts which should be visible in Online IESO Registration when looking at machine account details. The Custodian Person ID and first and last names for the machine account are shown.

The same holds true for the production Online IESO Registration system. Participants were advised they had up until August 17 to make email address corrections for all registered users where needed before the bulk creation of Gateway accounts was done. However, corrections can be made on an ongoing basis with notification of such to IESO Customer Relations so manual re-issuance of account activation emails can be done. Then the IESO can be assured that production activation emails will go out to all registered users.

Under such circumstances if an end user did receive a Sandbox account activation email notification or the same for Production in August, the end user can email IESO Customer Relations at customer.relations@ieso.ca with the subject "IESO Market Facing Application Account Activation email recovery" to arrange for the activation email to be resent to the correct email address.

Will the new Gateway user accounts have Passwords that will expire periodically?

No, the IESO is not changing the password policies at this time; so new Gateway user accounts' passwords will not expire and force a password change. The improved MFA options for normal accounts and the continued registration of IP addresses of participant computers where machine accounts are used (which permits the IESO to configure its firewalls) is deemed sufficient for now for authentication purposes.

Will my new user account be different from my existing user account?

Each new IESO Gateway user account will as discussed above be issued with the same login username as the current Portal one. One significant difference is the multifactor authentication attributes. No longer are 5 security questions required. Now it is just one but additional MFA

verification token communication channel options of email or SMS text message are available for the end user to choose during activation or an Okta Verify option which requires the end user to download an app to their mobile phone. These are explained in the IESO Gateway User Guide. MFA options are not applicable to API (machine) accounts.

For those users who cannot use a mobile phone for SMS text message token authentication purposes, please let IESO Customer Relations know so alternative MFA options can be provided for.

Do applications typically have different User Accounts for them?

Typically, no except for IESO Workspaces which uses separate email based accounts. Most users registered in Online IESO for accounts have one personal account issued to access all applications. Exceptions are API (machine accounts) and TRA users who represent more than one participant organization. For TRA each organization participating in that market, the user must have an account that is unique. So where a user represents 2 organizations they need 2 separate accounts and so on. Any user account issued can also access Online IESO as well.

Is there a transition period for switching over to using my new user account from my old user account?

Essentially no. After the go-live / cutover date of August 9 for Sandbox and September 14-16 for Production there is no transition period. As discussed above once an activation email is issued for a new IESO Gateway account; it can be activated ASAP and checked for login to the corresponding IESO Gateway environment. Foe production, until the IESO moves the market facing applications over to the IESO Gateway on the cutover dates, the old accounts can continue to be used.

Once a cutover date has been reached for an application in production and the IESO goes live for the market facing applications in the IESO Gateway, then the old Active Directory based accounts are no longer usable.

How do I get a new user account for Market Facing applications in Sandbox and Production after the IESO Gateway implementations have happened?

For new participant persons/users being registered by a participant Applicant Representative in Online IESO for access to any market facing application, the Online IESO Registration system (Sandbox or Production) will automatically run an account provisioning workflow to the corresponding IESO Gateway system to create a user account for the subject person. The end user will immediately receive an activation email complete the initialization of their user account and once they have done so they will be able to use it to login to the IESO Gateway and access the application(s) they have been registered for or where applicable the IESO Reports site or use the account where it is an API account for web service use, with the appropriate IESO web service.

If I no longer need a user account what should I do?

Where a participant end user no longer needs to access any IESO market facing applications they should inform the person at the market participant acting in the role as a registered Applicant Representative or Rights Administrator. The Applicant Representative or Rights Administrator will then deregister and end date the person for IESO systems access in Online IESO which will then automatically deactivate their user account in the IESO Gateway system. This must be done for either Sandbox and/or Production systems access and user accounts.

Is any market facing application changing at all?

For the most part existing market facing application functionality and the graphical user interface for each is not changing except for the authentication system and login pages being switched from Oracle Access Manager to the Okta based IESO Gateway system and access to the applications being controlled via the IESO Gateway systems.

The Transmission Rights Auction system and Prudential Manager are being moved out of the IESO Portal to their own web servers where applicable and the functionality and pages are essentially the same with some minor GUI differences but authentication and access is via the IESO Gateway.

The Reports site essentially remains the same as it is now, except access will be via the same IESO Gateway user accounts as other market facing applications.

However for the IESO Dispatch service there is the need for Market Participants to add a second URL for Dispatch Service UI (MP firewalls must allow access to http://dispatch.ieso.ca/ieso-ds-ui/ in addition to https://dispatch.ieso.ca/ieso-ds-ui/)

Contact the IESO for more detailed information.

Will https://reports.ieso.ca/public continue to be accessible without login and password?

Public reports will remain as is and does not require a password. The production private reports site however will be switched over to Gateway user accounts on the scheduled day of implementation cutover for Production environments. Sandbox is already cutover.

What browsers are recommended for the IESO Gateway

The recommended browser information can be found on the IESO corporate website in the Updated Participant Technical Reference Manual (PTRM) located on the document Pending Changes page at: https://www.ieso.ca/sector-participants/change-management/pending-changes-documents

The IESO publishes this information on the Supported Client Platform page on the corporate website at: https://www.ieso.ca/en/Sector-Participants/Supported-Client-Platforms and will be updating the information there where applicable.

Will BEACON be impacted as well?

No there is no impact to production BEACON from the Portal replacement project.

Are all Retrofit application portal users affected by this change?

LDC and Service Providers will be required to activate new accounts. Applicants and Applicant Representatives will not be impacted

Does this mean that applicants wanting to login and submit a new Retrofit project will have to create a new account as well?

No, this is not required.

Who can provide assistance at the IESO?

IESO Customer Relations at customer.relations@ieso.ca can provide assistance regarding user accounts who can for other related issues to the IESO Gateway changes, assign an IESO tier 2 support person to contact you to assist.