



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

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

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

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

- Submit dispatch data using the Energy Market Graphical User Interface (GUI), also known as Workspace, via the Market Trading community;
- Access your revenue metering information using MV-WEB via the Settlements community;
- Submit and view settlement data via the Settlements community;
- Submit and manage outage requests using the Online Outage Request Form via the Outage Management community;
- Receive notifications and report on your compliance with the Ontario Reliability Compliance Program using the Reliability Compliance Tool via the Reliability Compliance community;
- Access the Transmission Rights Auction (TRA) System via the Transmission Rights Auction community; and
- Access collaboration community pages and 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. System access requests are managed through Form 1276, “IESO System Access Request and Identity Management Form.” For more information, please contact 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.

2.1 Accessing the Portal

When you are registered as an IESO system user, we provide you with a 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). Please note that the Production Portal and Sandbox Portal passwords are not interchangeable.

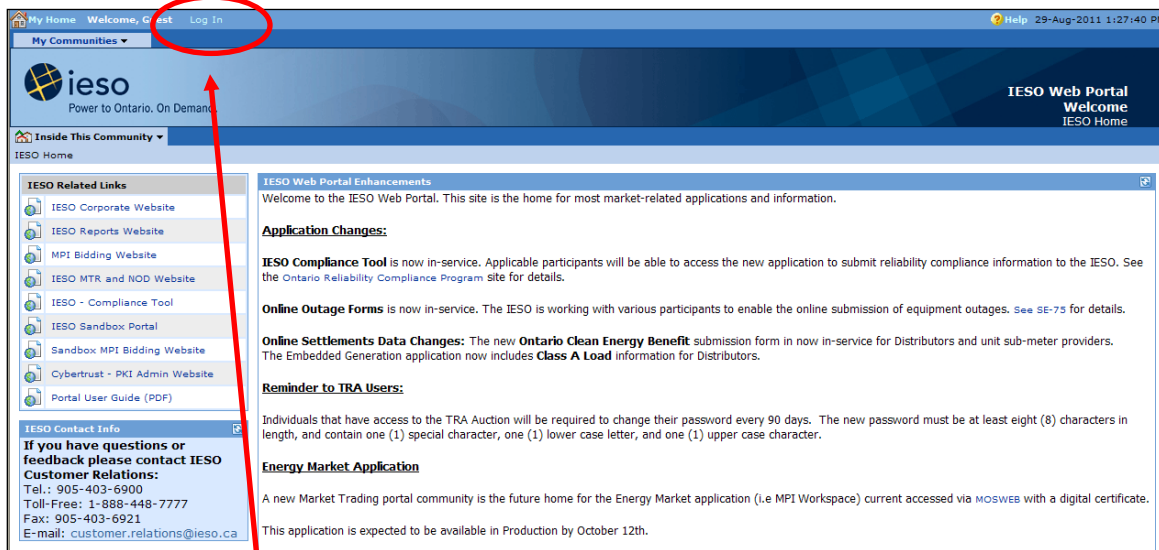
The first time you log on, you are prompted to change your temporary password to one known only to you. Be sure to choose a password you can remember. If you have forgotten your password, please contact IESO Customer Relations.

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 (please **do not** use the following symbols: & (ampersand), \ (backslash), > (greater-than sign), < (less-than sign), ' (single quote), or " (double quote/quotation mark).)
- Do not include spaces in your password
- Keep in mind that the password is case sensitive

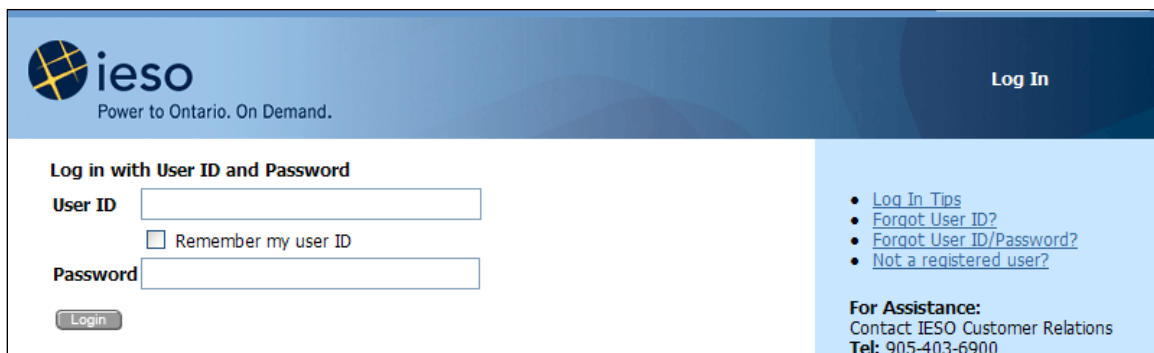
2.2 Logging On With Your User ID and Password

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 **Log In** page appears:



Step 3: Read the legal terms on the page and then enter your **User ID** and **Password**. Click the **Login** button to accept the terms and to log 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").

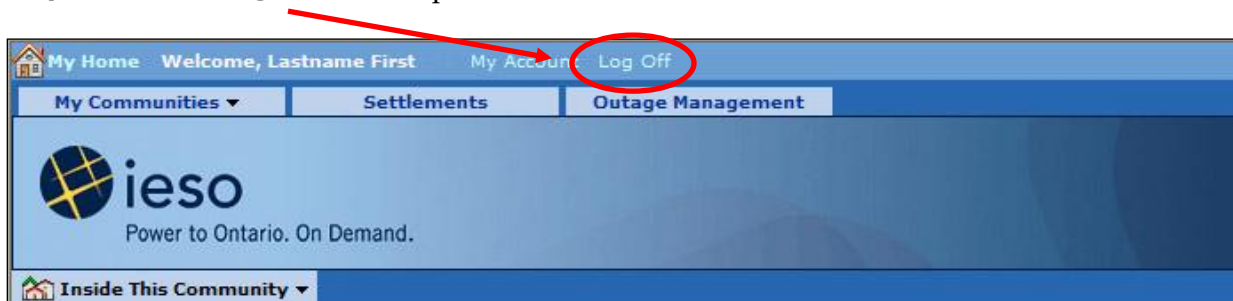
When you have logged in, you will see tab buttons for your communities (shown below, circled in red). Click on the community tab that you want to use. The selected Community Home Page will be displayed (in this example, the **Outage Management Home Page** is shown):



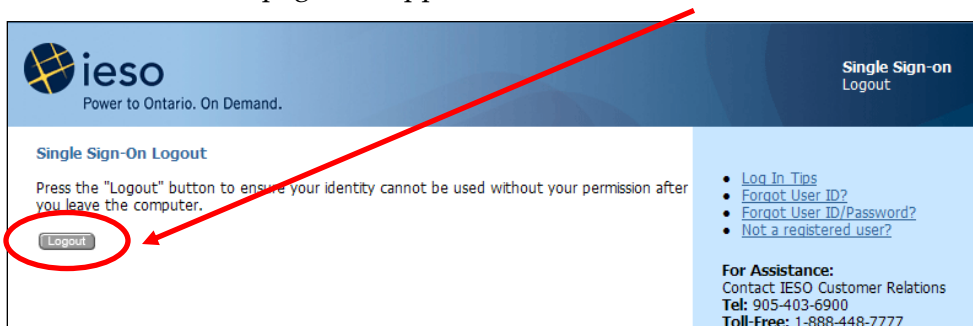
2.3 Logging Off

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.



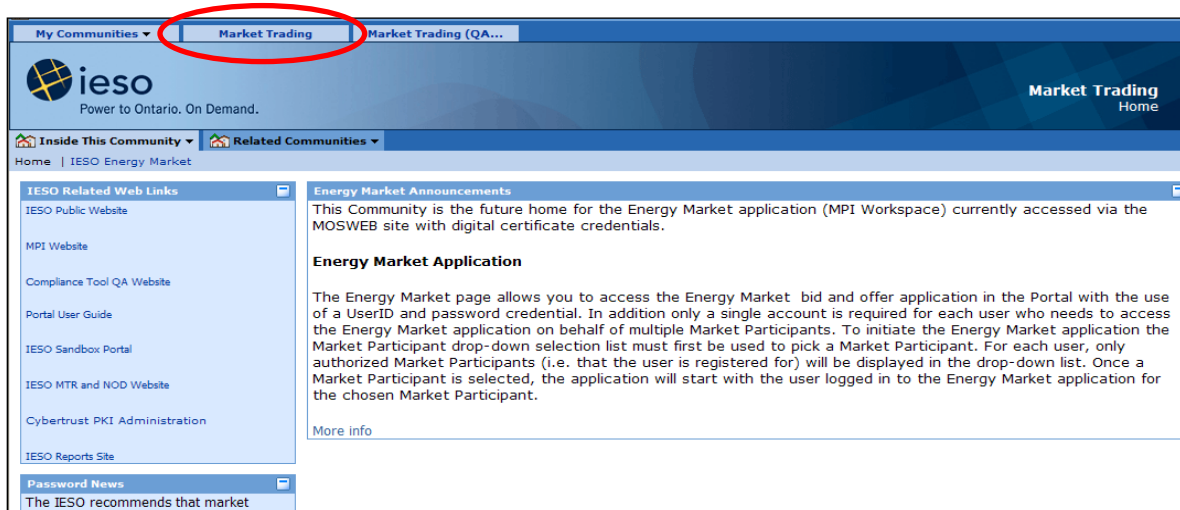
2.4 Tool Finder Quick Reference

Tool Name (alpha order)	Required Tab (Community)	For More Information
Collaboration Community	By Community name, e.g. NERC CIP Community GO TO Section 9, page 20	Contact your Collaboration Community administrator
MV-WEB	Settlements GO TO Section 4, page 9	IMO_GDE_9002 MV-WEB User Guide
On-line Outage Request Form	Outage Management GO TO Section 6, page 14	IESO Training: Online Outage Request Tool – A Step-by-Step Guide
Reliability Compliance	Reliability Compliance GO TO Section 7, page 17	IESO Training: Reliability Compliance Tool – A Step-by-Step Guide
Settlements Data Forms	Settlements GO TO Section 5, page 11	IESO Training: Guide to Online Data Submission via the IESO Portal
Transmission Rights Auction System	TRA GO TO Section 8, page 18	IMO_GDE_0004 Transmission Rights Auction System - Market Participant User Guide
Workspace (Energy Market Graphical User Interface)	Energy Market GO TO Section 3, page 6	IMO_GDE_0003 Market Participant Graphical User Interface User's Guide IESO Training: Energy Market Graphical User Interface Workspace Training Manual

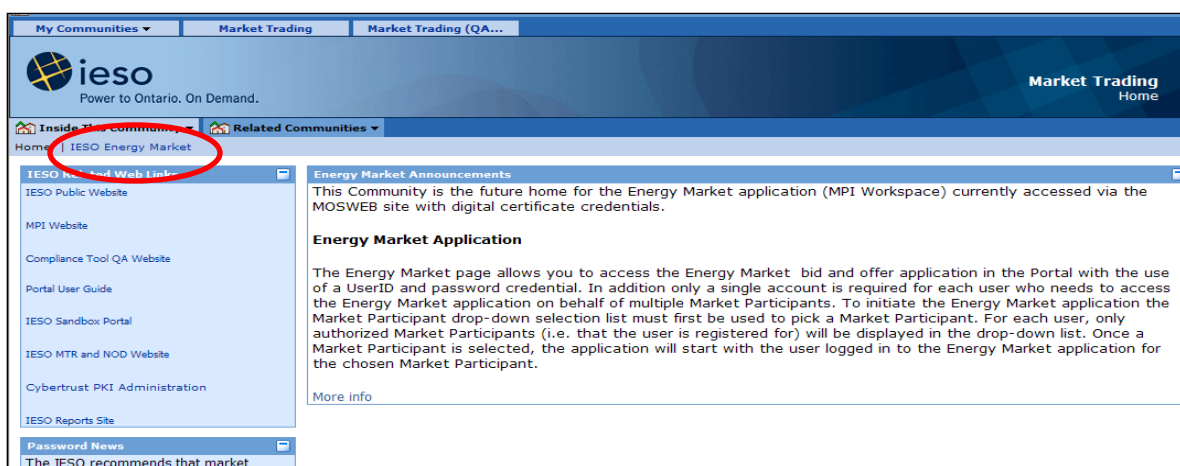
3. Accessing the Energy Market Graphical User Interface Workspace

The IESO Energy Market Graphical User Interface Workspace (or 'Workspace') is available through the Market Trading Community. Workspace is used by market participants to enter bids and offers, schedules, forecasts, and physical bilateral contracts in the Physical Energy Markets.

Step 1: Log on to Portal using your user ID and password, following the steps in Section 2.1, then select the **Market Trading** community.

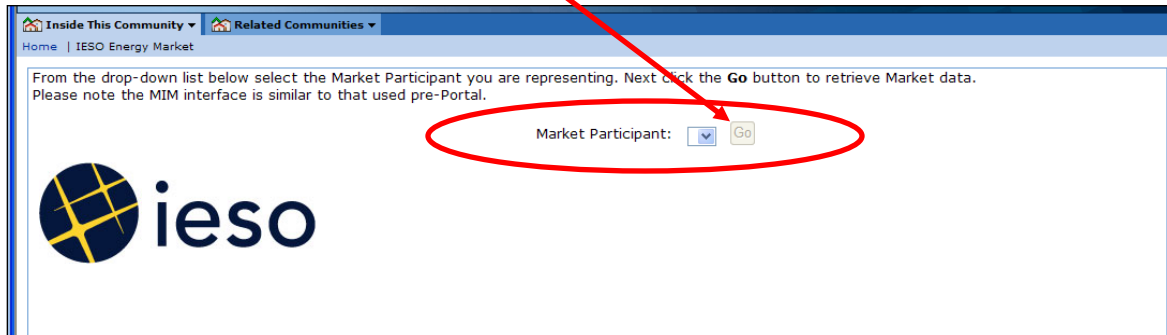


Step 2: Click on **IESO Energy Market** to access the Workspace application.

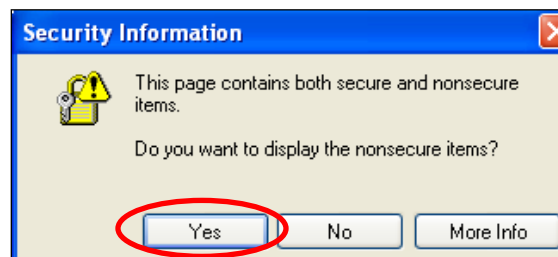


Step 3: A drop-down menu will appear, with your Market Participant name. If you are registered to participate in the IESO physical market for more than one Market Participant, you will see each Market Participant name listed. If the list is empty, please contact IESO Customer Relations for assistance.

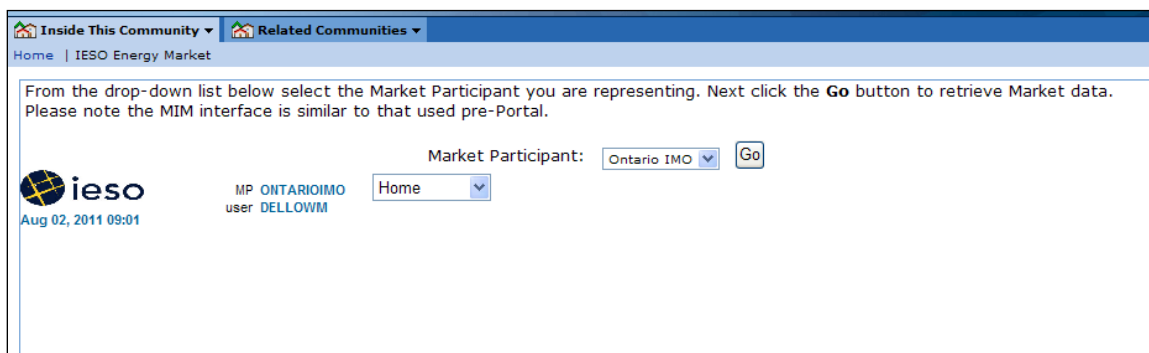
Select the name of the **Market Participant** you are representing in this session by clicking once on the name in the drop-down menu. It should now appear in the display box for the drop down menu. Click on **Go**.



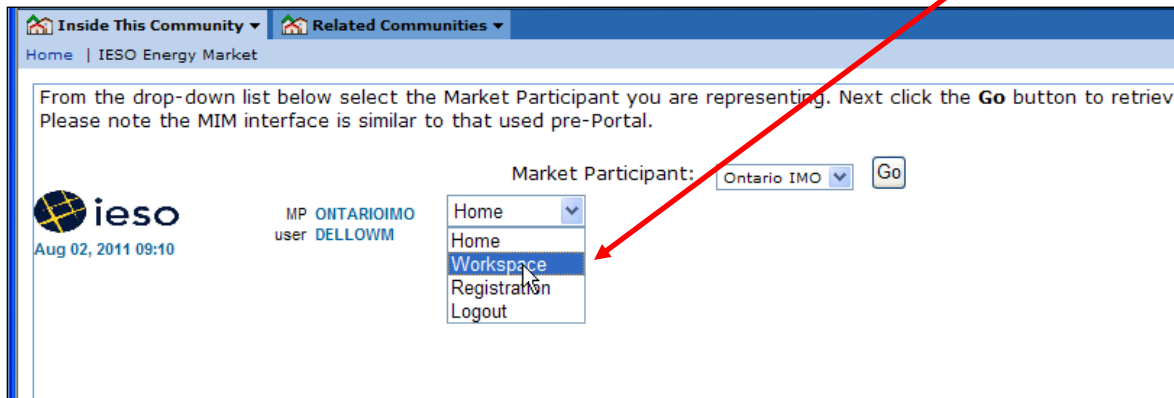
A **Security Information** box may appear. Click on **Yes** to continue. If you select **No** or **More Info**, the application will not open.



Step 4: The Energy Market application will now appear, along with two pop-up windows (the **System Messages Display** window and the **Market Status Display** window).

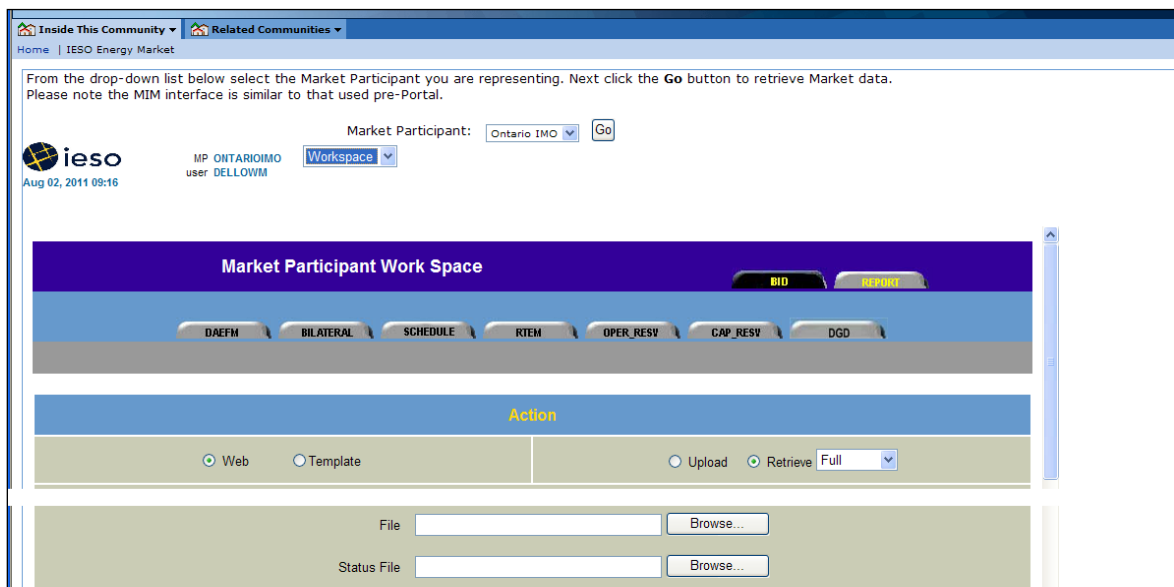


Step 5: To access Workspace, use the drop-down menu and click on **Workspace**.



The application will now appear in the Portal window. A series of IESO Training guides for the Workspace are available at www.ieso.ca/imoweb/marketplaceTraining/mpi-trainingManual.asp.

When using the Workspace in Portal, it is very important to only open and use a single session window in Internet Explorer. Opening the Workspace tool in more than one Internet Explorer tab or on a second Internet Explorer session window will cause the tool to malfunction. This single-window limitation applies only to the Workspace tool in Portal, however. A user, for example, could run a single Internet Explorer session for Workspace, but log-in to Portal in a second window to access a different tool, such as the On-line Outage Request Form. As long as the user does not click on Workspace in the second session, the Workspace tool will continue to function normally.



Step 6: Logging Off

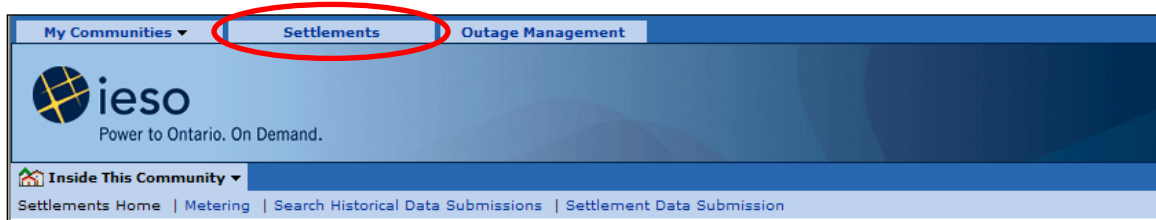
Be sure to log off the Energy Market GUI Workspace and Portal when you have finished your session. If you don't log off, you will stay connected to the Portal (you will be required to log on again after 12 hours, however). For improved security, we recommend that you always log off when you finish your session.

Timing Out: Your session will timeout if it has not been used for two hours.

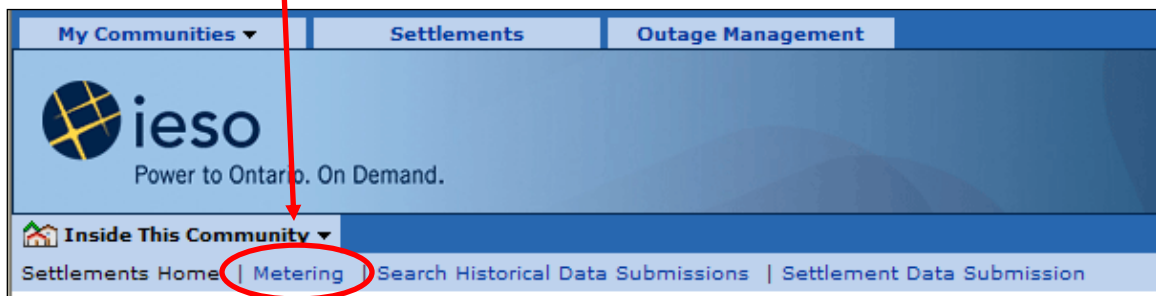
4. Accessing MV-WEB via the Settlements Community Pages

MV-Web, the tool that provides access to revenue metering data for the previous 18 months, is available through the Settlements Community.

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



Step 2: Click on **Metering**.



The **Metering** page appears:



Step 3: The name of your company appears in the **Market Participant** field. If you have access to metering data for more than one company, click the drop-down menu arrow to see a list of these Market Participants. You can then choose which company's data you wish to access.

Step 4: Select the required Market Participant and then click **Go** to launch the tool.



Settlements Home | Metering | Search Historical Data Submissions | Settlement Data Submission

Metering

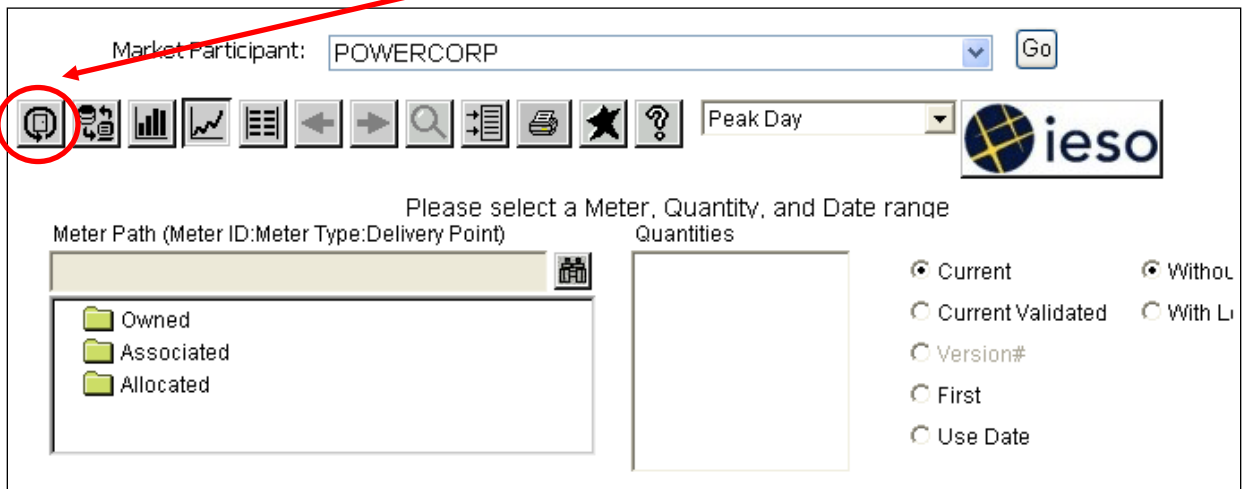
From the drop-down list below select the Market Participant you are representing. Next click the **Go** button to retrieve metering data. Please note historical meter data by meter point is available for 18 months.

Market Participant: POWERCORP

The **MV-WEB** home page will appear. For further information on using this tool, please see the *MV-WEB User Guide* on the IESO [Technical Interfaces](#) page:

www.ieso.ca/imoweb/pubs/ti/Revenue_Metering/MV-WebUserGuide41.pdf

As you use MV-WEB, you can return to the **home page** at any time by clicking on the return button.



Market Participant: POWERCORP

Peak Day

Please select a Meter, Quantity, and Date range

Meter Path (Meter ID: Meter Type: Delivery Point)

- Owned
- Associated
- Allocated

Quantities

- Current
- Current Validated
- Version#
- First
- Use Date
- Without
- With L

Step 5: Logging Off

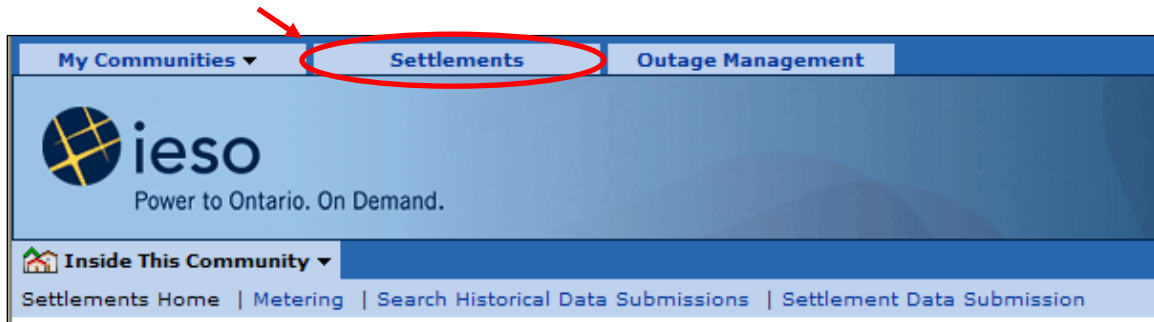
Be sure to log off Portal when you have finished your session. If you don't log off, you will stay connected to the Portal. For improved security, we recommend that you always log off Portal when you finish your session.

Timing Out: Your session will timeout if it has not been used for 90 minutes.

5. Submitting and Viewing Settlement Data via the Settlements Community

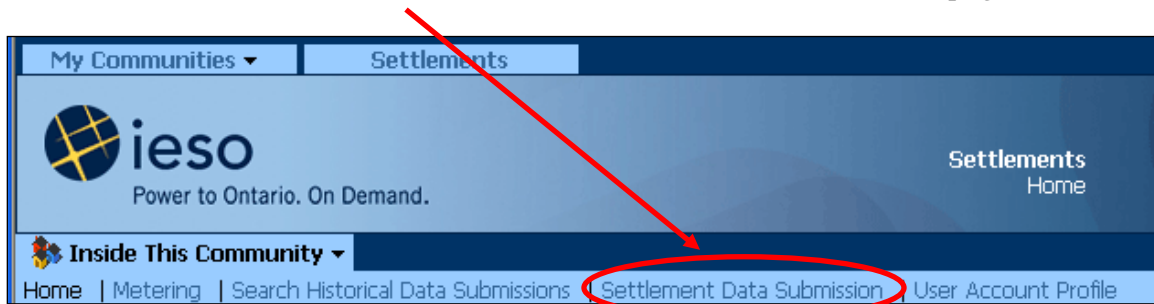
Forms required for sending settlement data to us are filled in and submitted via the Settlements community. It is also possible to view summary reports of your past submissions.

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.

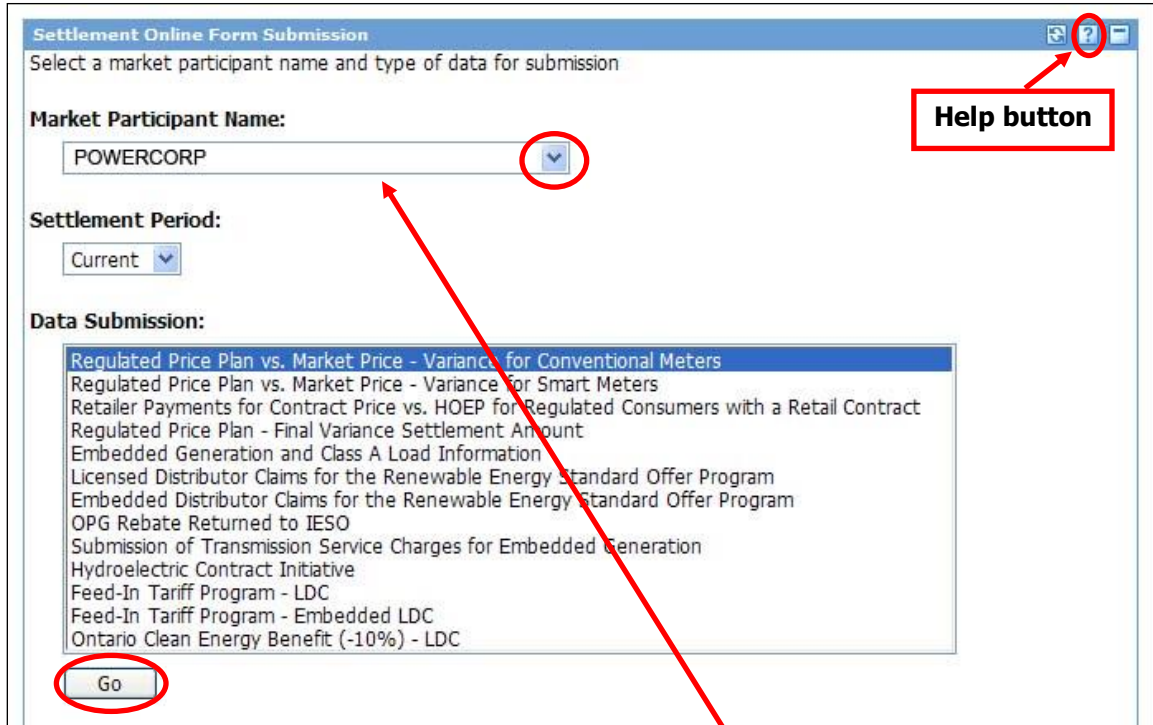


5.1 Submit Settlement Data

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



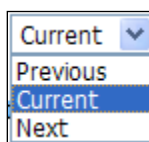
The **Settlement Data Submission** page appears.



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:



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 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*, <http://www.ieso.ca/imoweb/pubs/training/submitData.pdf>

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. 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 90 minutes.

5.2 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

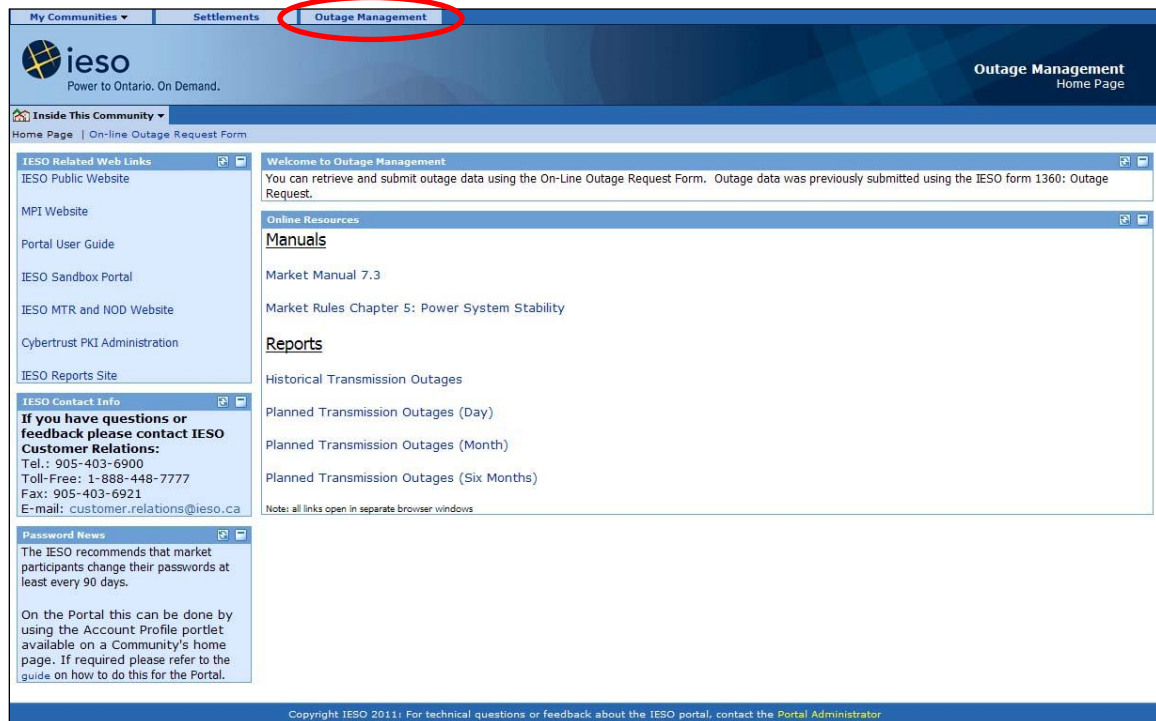
Be sure to log off when you have finished your session. If you don't log off, you will stay connected to Portal. For improved security, we recommend that you always log off when you finish your session.

Timing out: Your session times out after 90 minutes of not being used.

6. Accessing the On-Line Outage Request Form

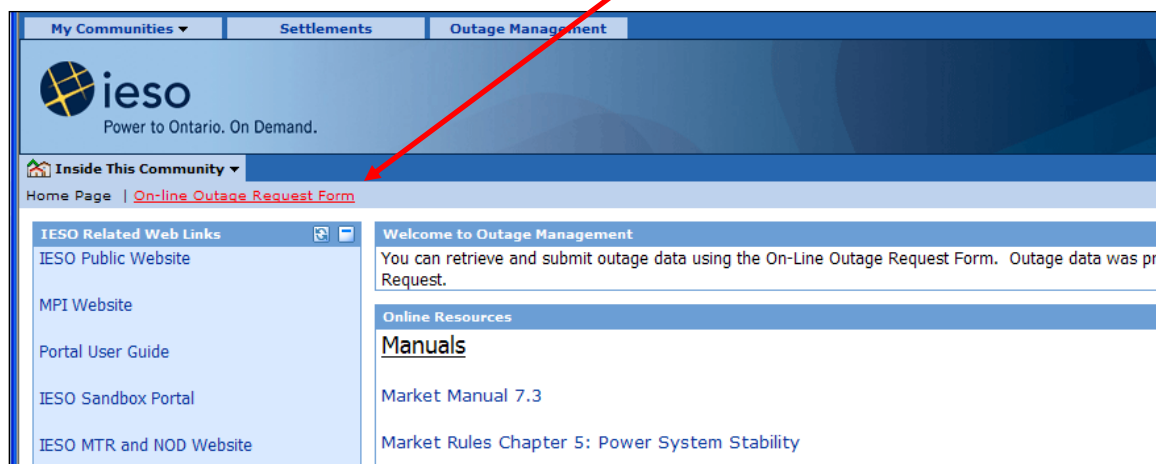
The On-Line Outage Request Form allows you to make and confirm outage requests, as well as monitor the status of your outage request and generate reports of your outage submissions.

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



The screenshot shows the IESO Portal interface. At the top, there are three tabs: 'My Communities', 'Settlements', and 'Outage Management'. The 'Outage Management' tab is highlighted with a red circle. Below the tabs is the IESO logo and the tagline 'Power to Ontario. On Demand.'. On the right side, there is a 'Welcome to Outage Management' message and a 'Home Page' link. The main content area is divided into several sections: 'Online Resources' with 'Manuals' (Market Manual 7.3, Market Rules Chapter 5: Power System Stability) and 'Reports' (Historical Transmission Outages, Planned Transmission Outages (Day), Planned Transmission Outages (Month), Planned Transmission Outages (Six Months)). There is also a 'Password News' section and a 'Customer Relations' section with contact information.

Step 2: Click on the link to the **On-Line Outage Request Form**:

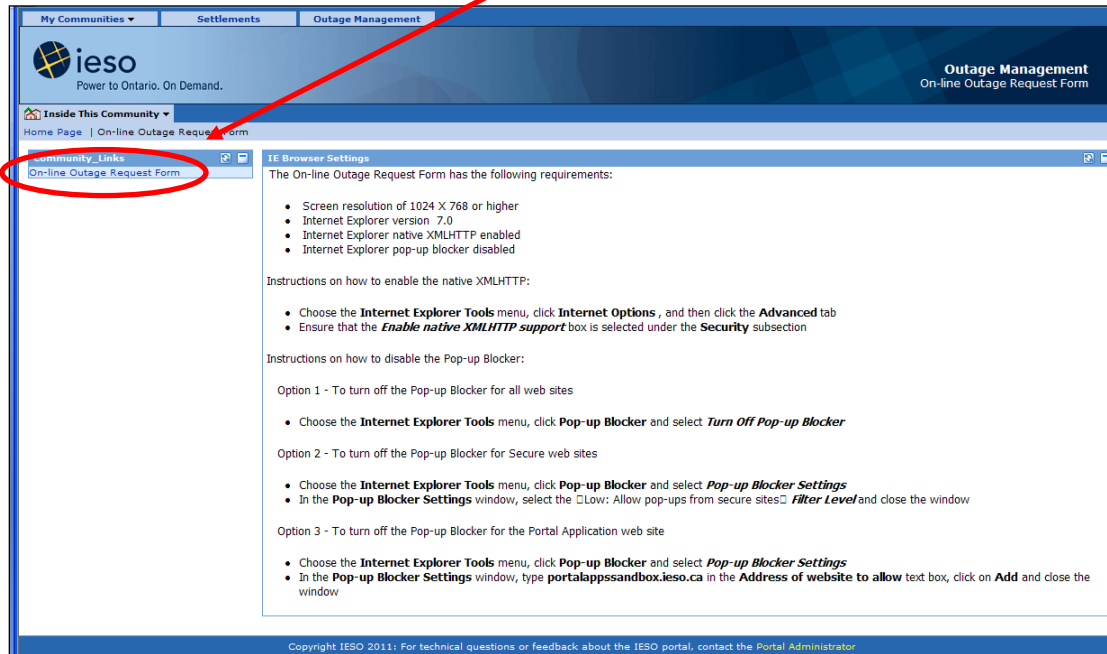


The screenshot shows the IESO Portal interface. At the top, there are three tabs: 'My Communities', 'Settlements', and 'Outage Management'. The 'On-Line Outage Request Form' link is highlighted in the navigation bar with a red arrow. Below the tabs is the IESO logo and the tagline 'Power to Ontario. On Demand.'. On the right side, there is a 'Welcome to Outage Management' message and a 'Home Page' link. The main content area is divided into several sections: 'Online Resources' with 'Manuals' (Market Manual 7.3, Market Rules Chapter 5: Power System Stability) and 'Reports' (Historical Transmission Outages, Planned Transmission Outages (Day), Planned Transmission Outages (Month), Planned Transmission Outages (Six Months)). There is also a 'Password News' section and a 'Customer Relations' section with contact information.

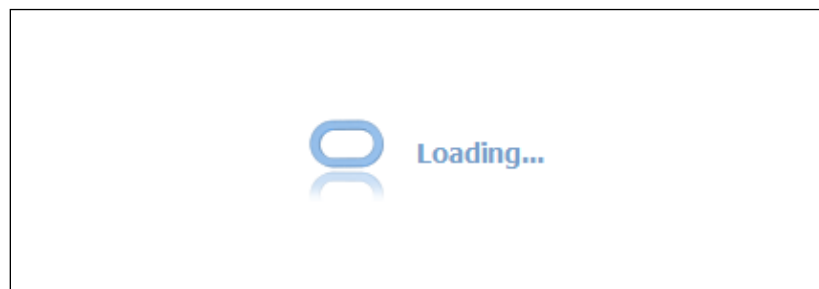
6. Accessing the On-Line Outage Request Form

This will take you to the **On-Line Outage Request Form** page which includes instructions and reminders about system settings required to use the On-line Outage Request Form tool. If you have trouble accessing the tool, double check these settings.

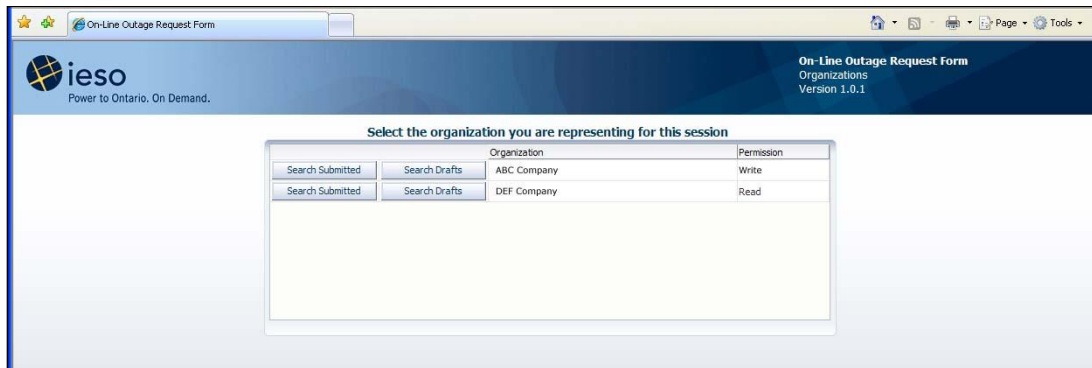
To access the tool, click on the **On-Line Outage Request Form** link.



The **Loading** icon will appear while your outage information is being retrieved:



Step 3: The On-Line Outage Request Form tool will open, and show a list of the Market Participants for which you can enter, revise, or view an outage. If you are only authorized for one company, you will only see that Market Participant name in your list.



To open a new Outage Request, click either **Search Submitted** or **Search Draft**. To continue with a previously entered draft Outage, click **Search Drafts**. To find a previously submitted Outage, click **Search Submitted**. For more information on using the On-Line Outage Request Form tool, please see the IESO Training guide, *On-Line Outage Request Tool: A Step-by-Step Guide*, <http://www.ieso.ca/imoweb/pubs/training/OnlineOutageDataSubmission.pdf>

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. For improved security, we recommend that you always log off when you finish your session.

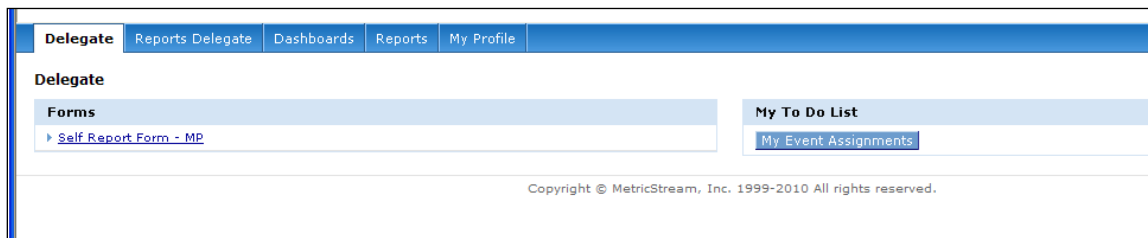
Timing out: Your session times out after 90 minutes of not being used.

7. Accessing the Reliability Compliance Tool

The Ontario Reliability Compliance Program Reliability Compliance Tool allows registered Reliability Compliance Main Contacts and Escalation Contacts to complete submissions for and follow up on the requirements of the Ontario Reliability Compliance Program.

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

Step 2: The Reliability Compliance Tool will open and any assignments will appear under “My To Do List.” For more information on using the tool, please see the IESO Training document, *The Ontario Reliability Compliance Program Reliability Compliance Tool: A Step-by-Step Guide*. <http://www.ieso.ca/imoweb/pubs/training/Step-by-Step%20Reliability%20Compliance%20Tool%20training.pdf>



Step 3: Logging off

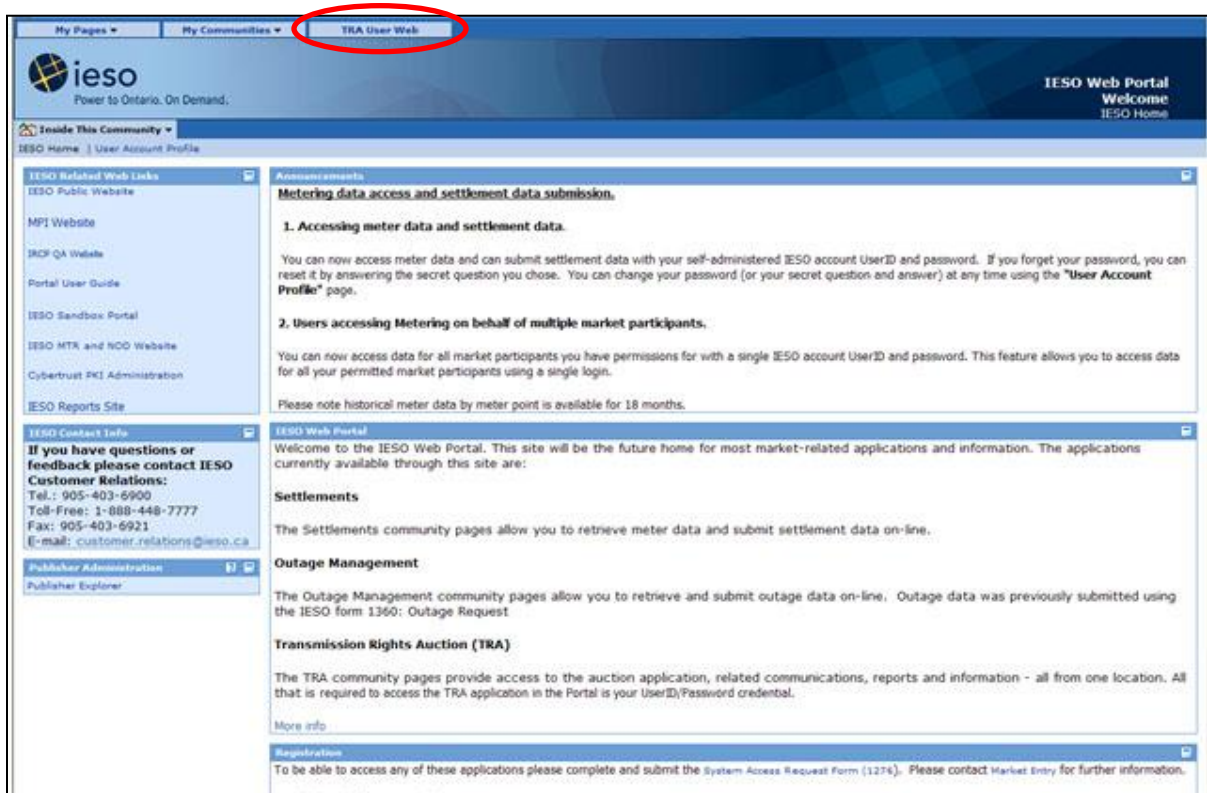
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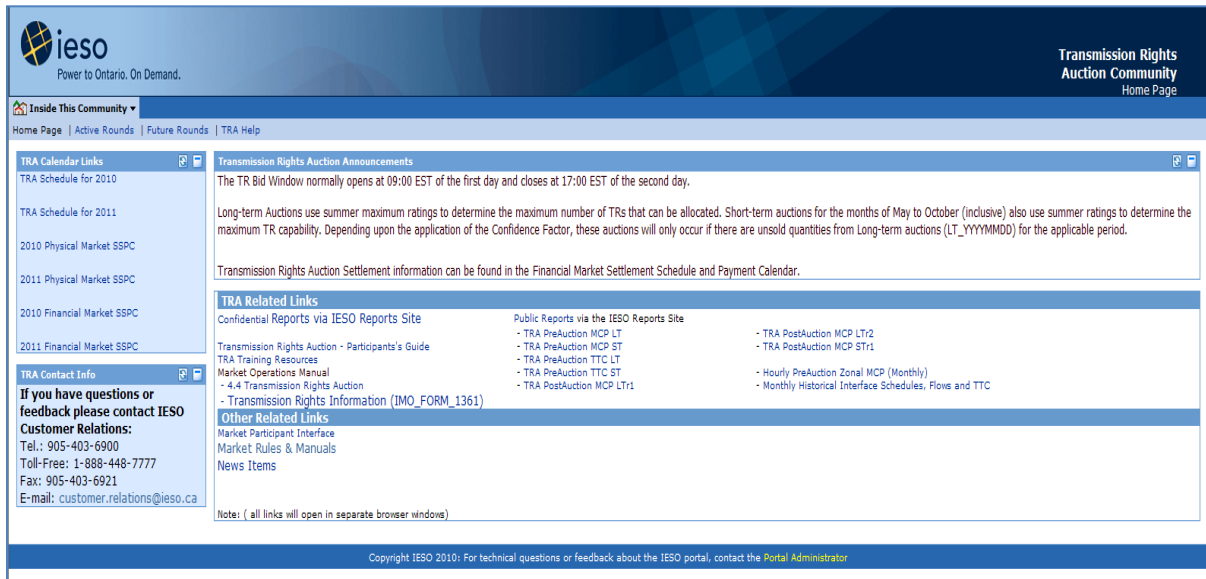
8. Accessing the Transmission Rights Auction System

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.



The screenshot shows the IESO Transmission Rights Auction Community Home Page. The navigation bar includes 'Home Page', 'Active Rounds', 'Future Rounds', and 'TRA Help'. The sidebar on the left contains 'TRA Calendar Links' and 'TRA Contact Info'. The main content area includes 'Transmission Rights Auction Announcements' and 'TRA Related Links'.

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*, http://www.ieso.ca/imoweb/pubs/ti/TR/it_TRAuctionSystem_mpUserGuide.pdf available on the [Technical Interfaces](#) web page.



This close-up screenshot highlights the navigation bar of the IESO Transmission Rights Auction Community Home Page. The 'Active Rounds' and 'Future Rounds' links are circled in red.

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. For improved security, we recommend that you always log off when you finish your session.

Timing out: Your session times out after 90 minutes of not being used.

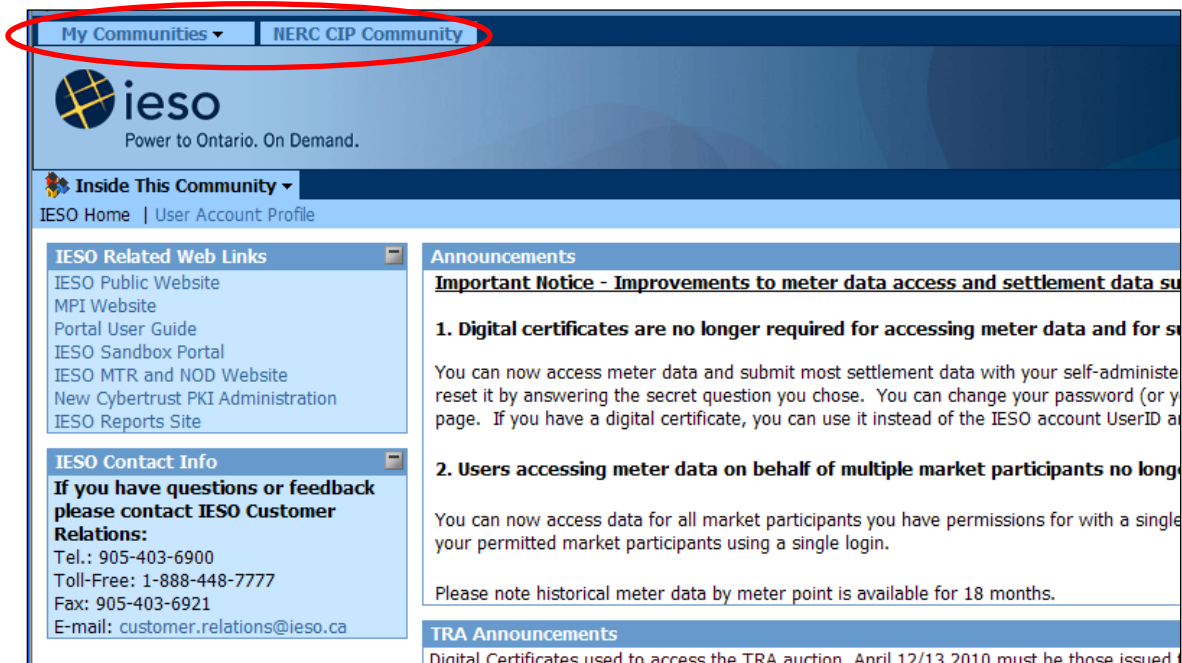
9. Accessing IESO Collaboration Community Pages

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.

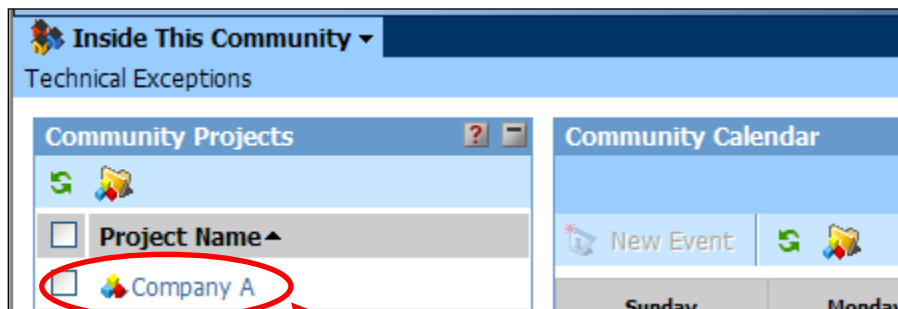
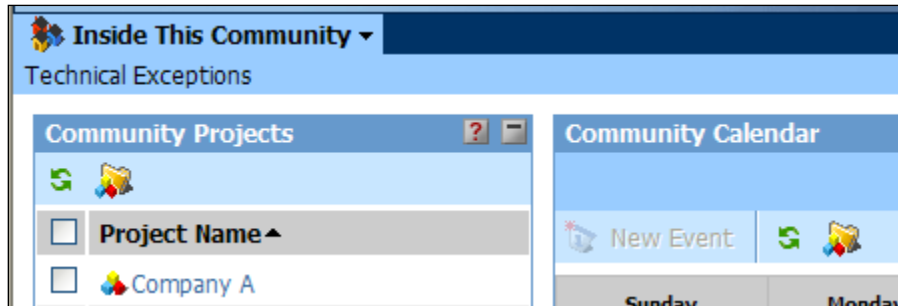
Step 1: Log on to the Portal with your User ID and Password, following the steps in Section 2.1.

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.



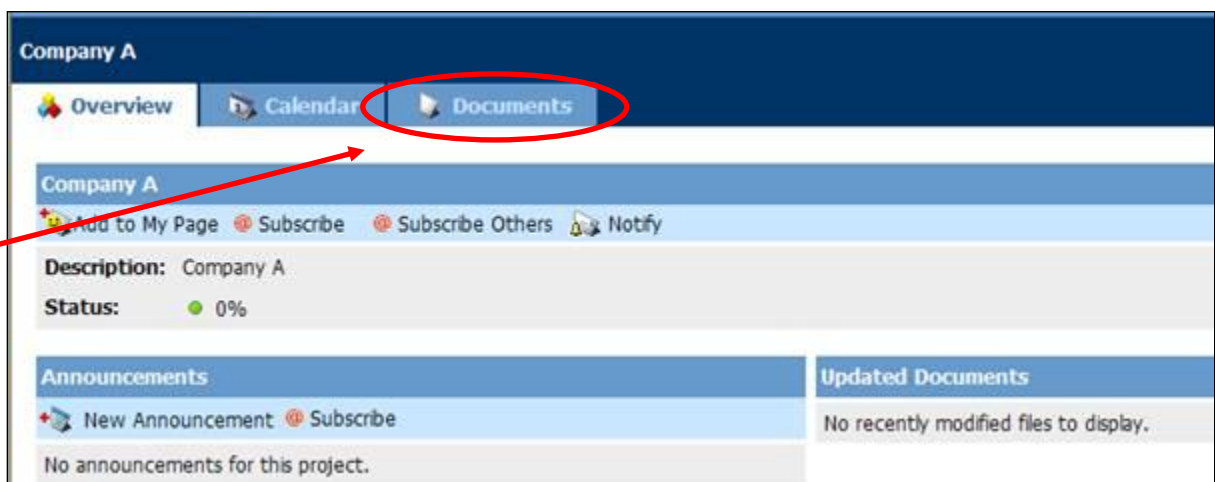
The screenshot shows the IESO NERC CIP Community interface. At the top, there is a navigation bar with a dropdown menu labeled 'My Communities' and a selected tab labeled 'NERC CIP Community'. Below this is the IESO logo and the tagline 'Power to Ontario. On Demand.'. The main content area is divided into several sections: 'Inside This Community' with links to 'IESO Home' and 'User Account Profile'; 'IESO Related Web Links' listing various IESO resources; 'IESO Contact Info' with contact details for customer relations; 'Announcements' featuring a notice about digital certificates and meter data access; and 'TRA Announcements' with a link to digital certificates used for TRA auctions.

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**.



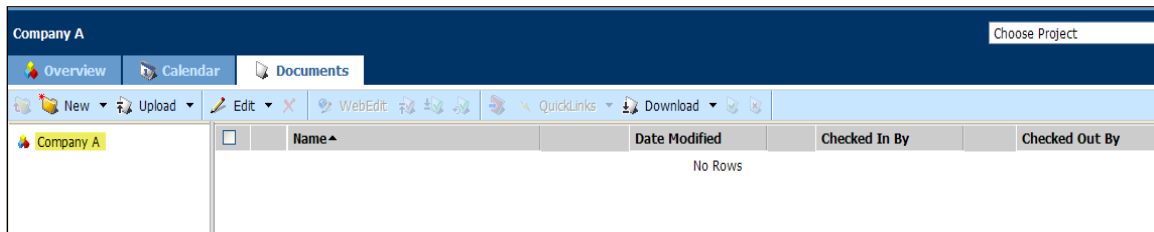
Step 4: Click on your **company name** to access content for your company.

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

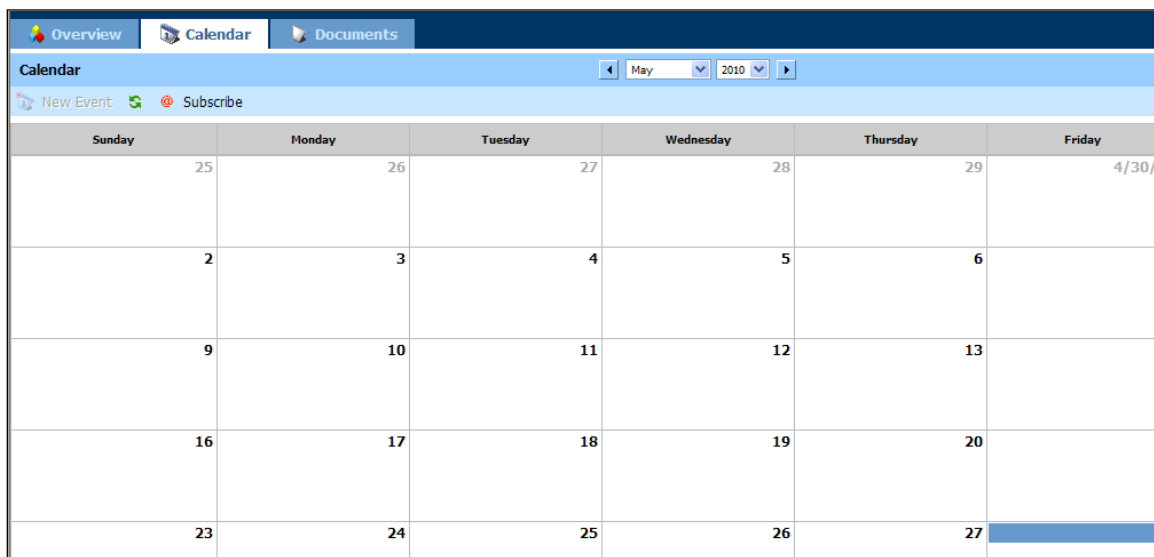


Step 5: Click on **Documents** tab to access the documents page for uploading or downloading shared documents.

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. For improved security, we recommend that you always log off when you finish your session.

Timing out: Your session times out after 90 minutes of not being used.

10. Additional Information

10.1 Browser Requirements

Please see the [Supported Client Platform](#) page on the [Technical Interfaces](#) web page for information about requirements for specific tools within Portal. Browser requirements for the portal are in the *Participant Technical Reference Manual (PTRM)*, also available on the [Technical Interfaces](#) web page.)

10.2 Energy Market Graphical User Interface (GUI) Workspace

For additional information on the Energy Market Graphical User Interface (GUI) Workspace, please see:

- *Market Graphical User Interface User's Guide*, available on the [Technical Interfaces](#) web page
- *Energy Market Graphical User Interface Workspace* manual available on the [Training](#) web pages

10.3 MV-WEB

For additional information on MV-WEB, refer to the *MV-WEB User Guide*, available on the [Technical Interfaces](#) web page

10.4 Submitting and Viewing Settlement Data

For additional information on submitting and viewing settlement data, refer to:

- *Guide to Online Data Submission via the IESO Portal*, available on the [Training](#) web page

10.5 On-Line Outage Request Tool

For additional information on using the On-Line Outage Request Form, refer to:

- *On-Line Outage Request Tool: A Step-by-Step Guide*, available on the [Training](#) web page

10.6 Reliability Compliance Tool

For additional information on using the Reliability Compliance Tool, refer to:

- *Ontario Reliability Compliance Program Reliability Compliance Tool: A Step-by-Step Guide*, available on the [Training](#) web page

10.7 Transmission Rights Auctions (TRA)

For additional information on transmission rights auctions, please see:

- *TRA System Participant's Guide*, available on our [Technical Interfaces](#) web page
- *Transmission Rights* workbook, available on our [Training](#) web pages

10.8 Collaboration Communities

For additional information on using a specific collaboration community, please contact your collaboration community administrator.

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

Telephone (905) 403-6900

Toll Free 1-888-448-7777

customer.relations@ieso.ca

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