



NOVEMBER 6, 2024

Wrap-Up Meeting for Market Trials

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Agenda

- Overview of Market Trials
- IESO's Classification of Defect Priorities
- Status Updates on reported Common Issues
- Lessons Learned during Market Trials
- IESO Support after Market Trials
- Next Steps

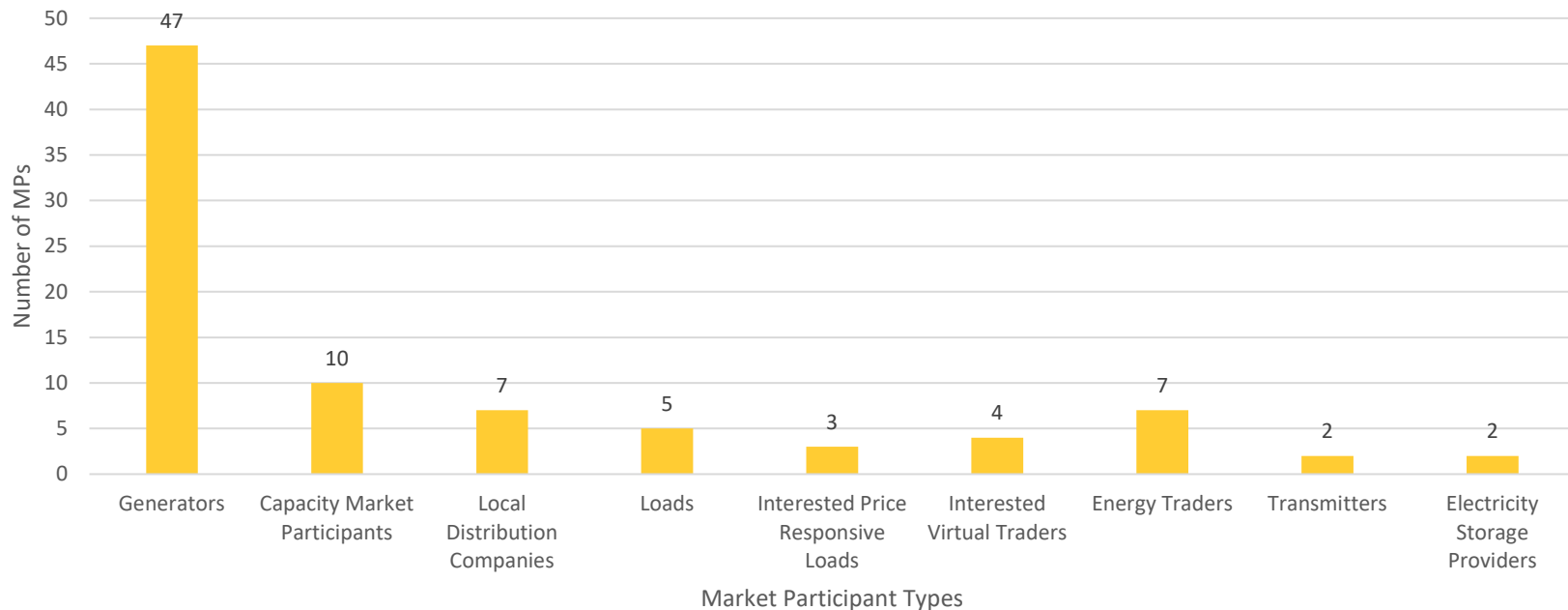
Overview of Market Trials

As of October 23, 2024:

- No critical system issues were reported during this test phase.
- 80 Market Participants participated in Market Trials.
- 3803 test cases were completed by Market Participants.
- Out of the issues reported:
 - 77% of issues were resolved,
 - 11% of issues are waiting on a response from the participant,
 - 6% continue to be investigated by the IESO, and
 - 6% of issues were cancelled as they were either duplicates of an existing issue or not related to the current testing phase

Market Participant Types Represented in Market Trials

(as of October 23, 2024)



Note: Some Market Participants represent more than one participation type.

IESO's Classification for Submitted Defects

Priority	Description
Critical	The defect will result in the failure of IESO's software system and will prevent the IESO from executing the applicable business process. The defect must be resolved by the end of End-to-End testing and prior to MRP Go-Live.
High	The defect will result in the failure of a functional component of IESO's software system and no workarounds exist. A workaround needs to be developed that will have a material impact on the IESO's business process(es). The defect should be resolved before the end of End-to-End testing and prior to MRP Go-Live.
Medium	The defect will result in the failure of a functional component of IESO system(s). However, a workaround exists that will yield a desired result, and it does not have a material impact on the IESO's business process(es). The IESO will target to resolve the defect prior to MRP Go-Live. If this target cannot be achieved, the IESO will communicate to Market Participants if and/or when the defect will be resolved in a future deployment.
Low	The defect <u>does</u> not result in the failure of a functional component and does not affect the execution of IESO's business process. The IESO will communicate to Market Participants if the defect will be resolved in a future deployment or rationale on why the defect will not be resolved.



Common Issues Reported in Phase 1

Common Issue Reported for Online IESO

Reported Issue	IESO Priority Ranking	Issue status
When users use the <i>Trade Month</i> filter to search for existing Fuel Cost Compensation forms, users reported that they are receiving files for different dates than what they were looking for.	Low	<ul style="list-style-type: none">• The issue has been resolved.• The Guide to Settlement Claims and Data Submissions via Online IESO has been updated and reposted on the MRP Participant Tool Training page.• The change clarifies that users should use the <i>Trade Date (Daily Submission)</i> field when searching for claims for a particular date as the Fuel Cost Compensation Form is considered a daily settlement form.• Users should only use the <i>Trade Month</i> field for monthly settlement forms.

Common Issues Reported for Energy Market Interface (EMI) & Market Information Management (MIM) System

Reported Issue	IESO Priority Ranking	Issue Status
A status code "500" is returned when users connect to EMI and/or MIM	Medium	<ul style="list-style-type: none">This is a known issue in both Sandbox and Production that occurs when Market Participants access EMI and/or MIM. Several workarounds have been attempted but the issue continues to persist today. The IESO is currently working with its vendor to explore other potential solutions and will communicate to Market Participants on next steps.
When the user changes the delivery date in EMI, the MP drop-down field is set to the default value, but the resource remains the same as what was previously selected	Low	<ul style="list-style-type: none">This issue has been fixed. Market Participants who reported this issue have been informed to re-test.

Common Issues Reported for EMI & MIM

Reported Issue	IESO Priority Ranking	Issue Status
The user does not get an error message when submitting the delivery date and standing day type information together.	Low	<ul style="list-style-type: none">The IESO is currently investigating and will communicate to Market Participants when this issue has been resolved.



Common Issues Reported in Phase 2

Common Issues Reported in the IESO Reports Site

Reported Issue	IESO Priority Ranking	Issue Status
The sample and schema files posted on the Technical Reference Materials page do not align with the design of the reports that are published in the Sandbox IESO Reports site	Medium	<ul style="list-style-type: none">• The IESO identified 14 additional reports that require their sample and schema files to be updated. These include:<ul style="list-style-type: none">• <i>Day-Ahead Reference Quantity Values</i>• <i>Real-Time Reference Quantity Values</i>• <i>Dispatch Data Report for Day-Ahead Scheduling Process</i>• <i>Dispatch Data Report for Real Time Scheduling Processes for Resources</i>• <i>Day-Ahead Market Financial Reference Level Report</i>• <i>Real Time Market Financial Reference Level Report</i>• <i>Day-Ahead Global Market Power Conditions for Energy Summary</i>• <i>Real-Time Global Market Power Conditions for Energy Summary</i>• <i>Day-Ahead Market Dynamic Constrained Areas</i>• <i>Real-Time Market Dynamic Constrained Areas</i>• <i>Narrow Constrained Areas</i>• <i>Intertie Economic Withholding Monthly Summary</i>• <i>Physical Withholding Monthly Summary</i>• <i>Economic Withholding Monthly Summary</i>

Common Issues Reported in the IESO Reports Site (con'td)

Reported Issue	IESO Priority Ranking	Issue Status
The sample and schema files posted on the Technical Reference Materials page do not align with the design of the reports that are published in the Sandbox IESO Reports site	Medium	<ul style="list-style-type: none">• The IESO will post the updated schema files on the Technical Reference Materials page on November 8, 2024.• Since the sample files are in xml format, Market Participants should be using the reports that were published during Market Trials as the sample files that are posted on the Technical Reference Materials may be outdated and were made available to Market Participants to assist them with their initial system development.• The IESO will only be updating and posting sample files that are in txt or csv format on the Technical Reference Materials page if they require updates.

Common Issues Reported in the IESO Reports Site

Reported Issue	IESO Priority Ranking	Issue Status
Some of the Help Files for reports related to Market Power Mitigation (MPM) require revisions	Medium	<ul style="list-style-type: none">• The updated Help Files for the following MPM reports will be posted on the Technical Reference Materials (ieso.ca) page by Friday November 8th.<ul style="list-style-type: none">• <i>Day-Ahead Market Financial Reference Level Report</i>• <i>Real Time Market Financial Reference Level Report</i>• <i>Day-Ahead Reference Quantity Values</i>• <i>Real-Time Reference Quantity Values</i>• <i>Day Ahead Global Market Power Conditions for Energy Summary</i>• <i>Real Time Global Market Power Conditions for Energy Summary</i>• <i>Physical Withholding Monthly Summary</i>
Formatting errors for the "Created at" date were identified in the <i>Realtime Energy Dispatch Report</i> and <i>5-Minute Energy Schedule Report</i>	Medium	<ul style="list-style-type: none">• The sample files for the <i>Realtime Energy Dispatch Report</i> and <i>5-Minute Energy Schedule Report</i> have been updated to remove "-" and replace with "/" when providing the "Created at" date.• The sample files have been updated and re-posted on the Technical Reference Materials page.

Common Issues Reported for the IESO Reports Site

Reported Issue	IESO Priority Ranking	Issue Status
Some of the Pre-Dispatch Reports are not being published at 10:00 PM EST (HE22)	High	<ul style="list-style-type: none">• The following pre-dispatch reports are still not being published at 10:00 PM EST (HE22):<ul style="list-style-type: none">• <i>Predispatch Daily Energy Limit Tracking Report</i>• <i>Predispatch Number of Starts Tracking Report</i>• <i>Predispatch Intertie Transactions Schedule and GOG Eligible Extensions</i>• <i>Predispatch GOG-eligible Unit Inferred State Report</i>• The issue has been escalated to the vendor.• The IESO is anticipating that a fix will be deployed by the end of November or early December. The IESO will communicate to Market Participants once it has been resolved.

Common Issues Reported for the IESO Reports Site

Reported Issue	IESO Priority Ranking	Issue Status
The sample file posted on the Technical Reference Materials page is different from the one in the Sandbox IESO Report site for the <i>Pre-dispatch Hourly Energy LMP Report</i>	Low	<ul style="list-style-type: none">• A formatting error was identified in the sample file that was posted on the Technical Reference Materials page where additional commas follow the date the report was created for.• The IESO has updated and posted the updated sample file on the Technical Reference Materials page.



Common Issues Reported in Phase 3

Common Issues Reported for Dispatch Service

Reported Issue	IESO Priority Ranking	Issue Status
User is unable to sort dispatches using the following columns: <ul style="list-style-type: none">• <i>Effective Time</i>• <i>Sync Time</i>• <i>Alt Sync Time</i>• <i>Delivery Start</i>• <i>Delivery Stop</i>• <i>MLP Time</i>	Low	<ul style="list-style-type: none">• This issue has been fixed. Market Participants who reported this issue have been informed to re-test.

Common Issues Reported for Dispatch Service

Reported Issue	IESO Priority Ranking	Issue Status
The Message_ID format for the start, decommitment and extend notifications are different than the one published in the Dispatch Service Design Specifications posted on the Technical Reference Materials (ieso.ca) page	Low	<ul style="list-style-type: none">• This issue has been resolved.• The IESO has posted the updated version of the Dispatch Service Web Service Design Specifications (SPEC-154) document on the Technical Reference Materials (ieso.ca) page.



Lessons Learned during Market Trials

Lessons Learned during Market Trials

Lesson Learned Description MRP Action

Market Participants wanted more clarity on the IESO's responses to common issues being reported during Market Trials.

- The IESO scheduled two touchpoint meetings during this test phase to improve communication with Market Participants. During these meetings, Market Participants were informed on the status and resolution of issues that have been reported and allowed Market Participants to ask questions they may have about MRP testing.
 - The IESO will also be hosting Q&A sessions during the last phase of Market Participant testing, End-to-End Testing.
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Market Participants indicated that they were unable to view certain Market Participant confidential reports

- The IESO developed a [List of Market Participant Confidential Reports available for Market Trials](#) to confirm which reports are applicable for specific participation type(s).
 - If your organization's participation type is not eligible to receive a certain report, you will not see the related folder in the Sandbox IESO Reports site.
 - Please review your Participation Contact Roles in both the Production and Sandbox environment, specifically around the Operational Report system access and the Dispatch Data submitter and viewer roles.
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Lessons Learned during Market Trials

Lesson Learned Description MRP Action

Market Participants were found to be testing and reporting issues on test cases that are not applicable to their resource type

- Market Participants have access to test cases for all resource types that belong under their main participation type (ie. a wholesale consumer will have visibility to the test cases that were created for both dispatchable loads and non-dispatchable loads).
 - If test cases are not applicable to their organization, Market Participants should update the status of these test cases to "Not Applicable."
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Market Participants have asked how the IESO is prioritizing submitted defects

- When the IESO reviews a submitted defect from a Market Participant, the IESO will assign its priority based on the issue's impact to the IESO's software systems and business processes.
 - Starting in End-to-End Testing, the IESO will update the "Priority" drop-down menu if it differs from what Market Participants submitted based on its assessment of the issue.
 - Refer to Slide 5 in this deck to read more about IESO's Classification for Submitted Defects.
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Lessons Learned during Market Trials

Lesson Learned Description MRP Action

Market Participants do not have the correct contact role assigned to them to submit bids and offers for a resource

- Market Participants are to contact their organization's Applicant Representative to assign the *Dispatch Data Submitter* role to their user account in Online IESO.
 - The Applicant Representative will be able to assign the user-resource relationship in Online IESO to enable Market Participants to submit bids and offers for the resource in question.
 - Applicant Representatives can assign the user-resource relationship by going to Actions -> Manage Resources -> Modify User-Resource Relationships in Online IESO
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Market Participants do not have the correct contact role assigned to them to accept or reject dispatches

- Market Participants are to contact their organization's Applicant Representative to only assign the *Dispatch Instructor Operator* role to their user account in Online IESO.
 - If users are assigned the *Dispatch Instructor Viewer* role, they can only **view** dispatches.
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Issue Resolution

- The IESO will close issues that have been opened for more than 10 business days and where a pending response has not been received from the Market Participant.
- A note will be sent via qTest to inform participants that the issue is now closed and an update or follow up statement was not provided by the Market Participant.
- If Market Participants wish to re-open a closed record, they can do so by updating its status to "Re-Opened."
- If Market Participants are using the Issue Log Template, they can notify the IESO to keep the investigation open by emailing [IESO Customer Relations Team](#) with the defect ID that needs to remain active.

IESO Support after Market Trials

- Market Participants will still be able to access the Sandbox applications for Online IESO, IESO Report Site, EMI/MIM, and Dispatch Service after October 23, 2024. However, Market Participants may experience intermittent outages as the IESO prepares its Sandbox system for End-to-End Testing next year.
- The IESO will stop sending instructions and commitment notifications from the Dispatch Service system on November 11, 2024.

Next Steps

- The End-to-End Test Plan has been published on the [Market Participant Testing](#) page.
- To provide feedback on the End-to-End Test Plan, Market Participants have until November 7, 2024 to submit feedback using the [feedback form](#) that is posted on the [Market Participant Testing](#) page.
- An overview of End-to-End Testing will be presented to Market Participants during the November 20, 2024 stakeholder engagement meeting.
- Version 2.0 of the End-to-End Test Plan will be posted by the end of 2024.
- The last phase of MRP Market Participant Testing, End-to-End Testing, will start from **January 20, 2025 to March 21, 2025.**

Thank You

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