Energy Market Interface

Submitting, Revising and Cancelling Schedules and Forecasts IESO Training

June 2024





AN IESO TRAINING PUBLICATION

This training manual 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 training manual 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 training manual, even if such obligations are not specifically referred to herein. While every effort has been made to ensure the provisions of this training manual 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

The purpose of this guide is to provide detailed instructions on submitting, cancelling, and revising schedules and forecasts using the energy market interface (EMI).

This guide is mainly aimed at *market participants* who are *self-scheduling generation resources*, *intermittent generation resources* in the *physical market*.

Participants in Ontario's *physical markets* use EMI to do the following actions:

- Submit, review and revise *energy* and *operating reserve bids* and *offers*
- Submit, review and revise energy and operating reserve import offers and export bids
- Submit, review and revise schedules and forecasts
- Submit, review and revise daily dispatch data
- Submit, review and revise forebay dispatch data
- Receive market messages related to submissions made

2. Accessing EMI

The energy market interface (EMI) is the *market participant* interface with Ontario's *physical markets*. The EMI is used for:

- Participating in the *day-ahead market*, *real-time market* and *operating reserve market*: submitting, reviewing and revising *dispatch data*
- Participating in inter-jurisdictional energy trading: submitting, reviewing and revising import *offers* and export *bids*

Note: To access EMI, a user needs to be assigned to a *dispatch data* viewer or *dispatch data* submitter contact role. In order for a dispatch data submitter to submit *bids* and *offers* in EMI, an applicant representative of the organization needs to create a user-resource relationship in Online IESO. Additionally, an active gateway account is required.

To access the EMI, complete the following steps:

- 1. Open the EMI URL (<u>https://emi.ieso.ca</u>) or open the IESO Gateway URL (<u>https://gateway.ieso.ca</u>) and navigate to EMI.
- 2. Enter your IESO Gateway Username, Password and click Sign In.

Connecting Todas: Revening sensitive	
Sign In	
Username	
doejohn	
Password	_
•••••	
Remember me	
Sign In	
Need help signing in?	

The EMI main page displaying the current **Market Status** will appear (shown below). The **Market Status** display continually updates and displays the current status for each of the physical markets.

Screenshot to be included after WebService update

3. Submitting Schedules and Forecasts for Self-Scheduling and Intermittent Generation Resources

Self-scheduling generation resources and *intermittent generation resources* do not submit *offers*. Instead, they participate in the *physical markets* by submitting schedules or forecasts to the IESO.

Self-scheduling generation resources submit schedules and *intermittent generation resources* submit forecasts.

3.1 Preparing Schedules and Forecasts

The following instructions apply to preparing a schedule or forecast using the EMI. See Section 4, Revising and Cancelling Schedules and Forecasts, for information on revising or cancelling a previously submitted schedule or forecast.

For submission timeline information on submitting schedules and forecasts, see MM 4.1 s.7.

To submit a schedule or forecast, complete the following steps:

1. Select Schedule (SCH) under Markets from the menu on the left side of the EMI

[9	creenshot to be included after webservi	ce upda	ate]
2.	Select the Bid Type . If you expect your s week to week, select Standing . If your s	schedul schedul	e or forecast to be the same from day to day, or e or forecast is for a single day, select Normal .
	Schedule (SCH)		
	Bid Type : Normal Standing		Market Participant : 🗸 🗸
	Delivery Date : 2024/03/22	20	Schedule Type : 🛛 🗸
	Standing Day Type : ALL ~		Resource Name : 💦 🗸

3. If you are submitting a **Normal** schedule or forecast, select the **Delivery Date**. For standing submissions, the **Delivery Date** field is not required and is therefore not selectable.

The **Delivery Date** defaults to the current *dispatch day*. If your *bid* is for the next *dispatch day*, click the calendar icon and select the appropriate date from the calendar.

Schedule (SCH)									
Bid Type : Delivery Date : Standing Day Type :	Normal O Standing 2024/03/22 ALL		Marc	Market F Sche ch ~	Participa dule Typ	nt : pe : 024 🔹 🕽	~	~	
			Sun	Mon	Tue	Wed	Thu	Fri	Sat
Expiry Date :	yyyy/mm/dd	ľ	25	26	27	28	29	1	2
			3	4	5	6	7	8	9
View - Clear	r Hours Copy Hours		10	11	12	13	14	15	16
Hour	Action Zero	Pri	17	18	19	20	21	22	23
Hour 1			24	25	26	27	28	29	30
		-	31	1	2	3	4	5	6
Hour 2						_			

If you select the **Delivery Date** after having already selected the **Schedule Type**, and **Resource Name**, you may have to select the correct **Schedule Type** and **Resource Name** again. EMI changes the schedule type and resource name lists based on the delivery date.

4. If you are submitting a standing schedule or forecast, select the **Standing Day Type**. If your standing schedule/forecast is for all days of the week, select **ALL**. Otherwise, select the day of the week to which the standing schedule/forecast applies.

Schedule (SCH)		
Bid Type : Delivery Date :	○ Normal ● yyyy/mm/dd	Standing
Standing Day Type :	ALL ~	
	ALL	
Expiry Date :	Monday Tuesday Wednesday Thursday	20

5.

If you wish, you may include an **Expiry Date** with a standing schedule or forecast. The **Expiry Date** is the last date the schedule or forecast will be valid for.

For example, if you enter an **Expiry Date** of July 28, the last time your standing schedule/forecast will be converted to a normal schedule/forecast is at 6:00 am EPT on July 27 and will be considered effective for the trade day of July 28.

Schedule (SCH)	
Bid Type : O Normal O Standing Delivery Date : yyyyy/mm/dd Standing Day Type : ALL V	1 25
Expiry Date :) 2024/07/28	2

6. Click the drop down next to **Market Participant** to see a list of the *market participants* on whose behalf you are authorized to enter *dispatch data*.

Choose the Market Participant for which you wish to enter a schedule or forecast.

\langle	Market Participant : 🗸 🗸	
	Schedule Type : 🛛 🗸	
	Resource Name :	\sim

7. Click the drop-down next to **Schedule Type** and select **INTGEN** (intermittent generator) or **SELFGEN** (self-scheduling generator), as required.

Market Participant :	\sim	
Schedule Type :	INTGEN ~]
Resource Name :	INTGEN SELFGEN	~

8. Click the drop-down next to **Resource Name** and select the facility for which you are submitting a schedule or forecast.

Market Participant :	
Schedule Type : 🗸 🗸	
Resource Name :	\sim

The **Resource Name** is the unique reference for a facility used when submitting bids and offers. It is also called the *delivery point* and is used as the point of settlement for Ontario's *physical markets*.

9. Proceed to Section 3.2, Entering Schedule and Forecast Data, to complete the empty submission form, or see Section 4.1, Retrieving Your Schedule or Forecast, if you have previously submitted a schedule/forecast and would like to populate the screen with *dispatch data* from that existing submission.

3.2 Entering Schedule and Forecast Data

To enter your schedule or forecast data, complete the following steps:

1. Select **Submit** from the drop-down next to the **Hour** number for the hour that you are submitting a schedule/forecast.

View -	Clear Hours Co	py Hours 🛃 Detac	ch
Hour	Action	Zero Price	Quantity
Hour 1	Submit	\rightarrow	
Hour 2	Submit	~	
Hour 3	Submit	\sim	
Hour 4		~	
Hour 5		\sim	
Hour 6		~	

The market software tools use the "hour ending" convention. In other words, Hour 1 is the first hour of the day; it is the hour that starts at midnight and ends at 1:00 am. Hours 10-11 are the hours from 9:00 am to 11:00 am. Hours 1-24 are the hours from midnight one day through midnight the next day. Eastern Standard Time is used year-round.

2. Enter your **Zero Price** for each hour. Enter the price in dollars and cents, up to two decimal places for each schedule/forecast. For example, negative two thousand dollars may be entered as -2000.00 or -2000.0 or -2000.

The **Zero Price** is the value (in dollars per MW) at and below which you reasonably expect to reduce energy output to zero. You may enter a positive, negative, or zero price so long as it is

View -	Clear Hours	Copy Hours Detach	
Hour	Action	Zero Price	Quantity
Hour 1	Submit	\sim	
Hour 2	Submit		
Hour 3	Submit	\sim	
Hour 4		\sim	
Hour 5		\sim	
Hour 6		~	

not lower than a negative *maximum market clearing price (MMCP)* or higher than a positive *MMCP*.

3. Enter the **Quantity** in MW (up to one decimal place) that you reasonably expect to provide for each dispatch hour.

View -	Clear Hours	Copy Hou	rs 🚮 Deta	ach
Hour	Action		Zero Price	Quantity
Hour 1	Submit	\sim		
Hour 2	Submit	\sim		
Hour 3	Submit	\sim		
Hour 4		\sim		
Hour 5		\sim		
Hour 6		\sim		

3.3 Entering the Same Zero Price and Quantity for Multiple Hours

An efficient way to copy the information from a chosen hour to other selected hours is by using the **Copy Hours** button. Therefore, if you submit the same **Zero Price** and **Quantity** for multiple hours in a day, complete the steps below.

1. Click **Copy Hours** after entering the **Zero Price** and **Quantity** for a single hour.

View -	Clear Hours Copy	Hours	🚮 Detad	ch	
Hour	Action	Zero	Price	Quantity	
Hour 1	Submit	∽ -20	00	5	
Hour 2		~			
Hour 3		\sim			
Hour 4		~			
Hour 5		\sim			
Hour 6		~			
Hour 7		\sim			

2. In the drop-down next to **From**, select the hour you wish to copy.

From :	1	\sim
	1	^
	2	
	3	
	4	
	5	
	6	
	7	
	8	

3. Select the hours you wish to copy the schedule/forecast to or select **All**, then click **Copy Data to Selected Hour(s)**.



4. Confirm your selection then click **Yes** to proceed.



The Zero Price and Quantity are copied to the hours selected.

View -	Clear Hours	Copy H	ours 🚮 Det	ach	
Hour	Action		Zero Price	Quantity	
Hour 1	Submit	~	-2000	5	
Hour 2	Submit	~	-2000	5	
Hour 3	Submit	\sim	-2000	5	
Hour 4	Submit	\sim	-2000	5	

3.4 Clearing Data from Multiple Hours

Rather than deleting each Zero Price and Quantity for any hour(s) or all hours, you can easily delete all data using the **Clear Hours** button.

1. Click **Clear Hours** to remove all data for any hour(s) or all hours.

View -	lear Hours Copy	Hours detact	ı
Hour	Action	Zero Price	Quantity
Hour 1	Submit	-2000	5
Hour 2	Submit	∽ -2000	5
Hour 3	Submit	-2000	5
Hour 4	Submit	-2000	5

2. Select the hours you wish to clear data for or select **All**, then click **Clear Data from selected Hour(s)**.

Clear Hours	
All	
1	
2	
8	
9	
10	
15	
16	
17	
18	
19	
24	
Clear Data from selected Hou	r(s) Cancel

3. Click **Yes** to proceed.

Confirm Clear Hours
This operation cannot be undone.
Are you sure you wish to continue?
Yes Cancel

The Zero Price and Quantity are cleared from the hours selected.

3.5 Submitting Schedules and Forecasts

Once you have finished entering your schedule or forecast information you are ready to submit your schedule or forecast to the IESO. Complete the following steps to submit your schedule/forecast:

1. Verify that the information is correct and complete.

2. Select **Submit** from the drop-down next to the **Hour** number for the hours that you are submitting as part of your schedule/forecast submission.

View -	Clear Hours	Сору Ног	ırs 🚮 Deta	ch	
Hour	Action		Zero Price	Quantity	
Hour 1	Submit	~	-2000	5	
Hour 2	Submit	~	-2000	5	
Hour 3	Submit	~	-2000	5	
Hour 4	Submit		-2000	5	

Otherwise, you may see the following error message when attempting to submit your schedule/forecast to the IESO:



3. Click **Submit** to send your schedule or forecast to the IESO.

Schedule (SCH)					
Bid Ty	pe : 🔘 Normal 🔵 S	Standing	Market Part	ipant : 🗸 🗸	
Delivery Da	ate: 2024/03/22	20	Schedul	Туре : 🚬 🗸	
Standing Day Ty	pe: ALL 🗸		Resource	Name : 🔍 🗸 🗸	
					Load Data Submit
Expiry Dat	e: yyyy/mm/dd	陸			
View - Clea	ar Hours Copy Hou	urs 🚮 Detach			
Hour	Action	Zero Price	Quantity		
Hour 1	Submit 🗸	-2000	5		
Hour 2	Submit 🗸	-2000	5		

4. You will receive a pop-up within a few moments of submitting your schedule or forecast, displaying its status. Review the **Submission Result** screen to ensure that your schedule or forecast has been successfully submitted. Please note that while not applicable to **Normal** submissions, **Standing Day Type** will return **ALL** in the output file due to default settings

File •						
Market Participant :						
Resource Name :						
3id/Offer Type :	Normal					
Standing Day Type :	ALL					
Schedule Type :						
Jpdate Transaction ID :	4RvBP5Vt					
Cancel Transaction ID :						
		Severity	Hour	Code	Action	Description
		INFO		PMPROC_I_SUBMIT-SUCCESS	Update	Successfully processed the SCHEDULE submission.

 Click Export to Excel to produce a spreadsheet of the Submission Result screen, or take a screen print for your records and/or record the Update Transaction ID number. The Submission Result screen cannot be retrieved again.

Market Participant :						
Resource Name :						
Bid/Offer Type :	Normal					
Standing Day Type :	ALL					
Schedule Type :						
Update Transaction ID :	4RvBP5Vt					
Cancel Transaction ID :						
		Severity	Hour	Code	Action	Description
						Successfully processed the SCHEDULE
		INFO		PMPROC_I_SUBMIT-SUCCESS	Update	submission.

A sample Excel export is included below:

4. Revising and Cancelling Schedules and Forecasts

Schedules and forecasts may be revised provided the changes follow the rules for revised schedules and forecasts. See *Market Rules* Chapter 7 and *Market Manual* 4.1 for more information regarding submitting revised schedules/forecasts or cancelling schedules/forecasts.

4.1 Retrieving Your Schedule or Forecast

The easiest way to revise or cancel your schedule or forecast is to first retrieve it. To retrieve your schedule or forecast, complete the following steps:

1. Select Schedule (SCH) under Markets from the menu on the left side of the EMI.

Screenshot to be included after webservice update

2. Select the **Bid Type** of the schedule or forecast that you are revising.

Schedule (SCH)		
Bid Type : Normal O Standing Delivery Date : 2024/03/22 Standing Day Type : ALL	B	Market Participant : Schedule Type : Resource Name :

 If you are retrieving a Normal schedule or forecast, select the Delivery Date of the schedule or forecast you are revising. For standing schedules/forecasts, the Delivery Date field is not required and is therefore not selectable.

Schedule (SCH)								
Bid Type Delivery Date Standing Day Type	e : Normal Sta e : 2024/03/22 e : ALL V	Marc	Market F Sche ch ~	Participa edule Ty	ant : pe : 024 🛊 🕽	~	~		
			Sun	Mon	Tue	Wed	Thu	Fri	Sat
Expiry Date	: yyyy/mm/dd	ľ	25	26	27	28	29	1	2
			3	4	5	6	7	8	9
View - Cle	ear Hours Copy Ho	ours	10	11	12	13	14	15	16
Hour	Action	Zero Pri	17	18	19	20	21	22	23
Hour 1			24	25	26	27	28	29	30
Hour 2			31	1	2	3	4	5	6

If you select the **Delivery Date** after having already selected the **Schedule Type**, and **Resource Name**, you may have to select the correct **Schedule Type** and **Resource Name** again. EMI changes the schedule type and resource name lists based on the delivery date.

4. If you are retrieving a standing schedule or forecast, select the **Standing Day Type**. If your standing schedule/forecast is for all days of the week, select **ALL**. Otherwise, select the day of the week to which the standing schedule/forecast applies.

Schedule (SCH)		
Bid Type : Delivery Date :	○ Normal yyyy/mm/dd	Standing
Standing Day Type :	ALL ~]
Expiry Date :	Monday Tuesday Wednesday Thursday	B
View - Clea Hour	r Friday Saturday Sunday	Hours Zero Price

Note that if you have previously retrieved data for another resource on this screen, you will need to clear the **Expiry Date** field or input the matching **Expiry Date** for the resource you are retrieving data for.

Schedule (SCH)	
Bid Type : O Normal Standing Delivery Date : yyyy/mm/dd Standing Day Type : ALL V	Ð
Expiry Date : yyyy/mm/dd	}

5. Click the drop down next to **Market Participant** to see a list of the *market participants* on whose behalf you are authorized to enter *dispatch data*.

Choose the Market Participant for which you wish to enter a schedule or forecast.

\langle	Market Participant :	~
	Schedule Type :	\checkmark
	Resource Name :	~

6. Click the drop-down next to **Schedule Type** and select **INTGEN** (intermittent generator) or **SELFGEN** (self-scheduling generator), as required.

Market Participant :	~
Schedule Type :	INTGEN 🗸
Resource Name :	INTGEN ~ SELFGEN

7. Click the drop-down next to **Resource Name** and select the facility for which you are submitting a schedule or forecast.

\langle	Market Participant : ~	
	Schedule Type : 🔍 🗸	
	Resource Name :	-

8. Click **Load Data** to populate the screen with the data from the schedule/forecast you are retrieving.

Schedule (SCH)			
Bid Type : Normal O Standing Delivery Date : 2024/03/22 Standing Day Type : ALL	₿ <mark>0</mark>	Market Participant : Schedule Type : Resource Name :	✓ Load Data Submit

4.2 Revising Your Schedule or Forecast

Once you have retrieved your schedule or forecast, you can revise the data as necessary. Below is an example of what you will see after clicking **Load Data** to retrieve your schedule or forecast.

Schedule (SC	CH)					
Bi Deliver	d Type : Normal y Date : 2024/03/22	Standing	Market P Sche	articipant : 🔍 🗸		
Standing Da	y Type : ALL 🗸 🗸		Resou	rce Name :	\checkmark	
						Load Data Submit
View -	Clear Hours Copy Ho	ours Detac	h			
Hour 1	Action	Zero Price	Quantity			
Hour 1 Hour 2	×	_				
Hour 3	~		-			
Hour 4	~					
Hour 5	~					
Hour 6	×					

To revise your schedule/forecast, follow these steps:

1. Ensure the **Delivery Date** represents the date of the schedule or forecast you wish to revise.

2. Select **Submit** from the drop-down next to the hour number for the hours that you are revising.

View -	Clear Hours	Copy Hours	s 🛃 Detac	h	
Hour	Action		Zero Price	Quantity	
Hour 1	Submit	$\overline{\mathbf{v}}$			
Hour 2	Submit	\sim			
Hour 3	Submit	\sim			
Hour 4		\sim			
Hour 5		\sim			
Hour 6		\sim			

If you wish to revise a portion of your schedule/forecast and cancel a portion of your schedule/forecast, you can do so in the same submission. Simply select **Cancel** for those hours that you are cancelling and follow the steps outlined in Section 4.3, Cancelling Your Schedule or Forecast.

- 3. Edit the Zero Price and Quantity, as required.
- 4. Click **Submit** to send your revised schedule or forecast to the IESO.

Schedule (SCH)		
Bid Type : Normal Standing Delivery Date : 2024/03/22 Standing Day Type : ALL	Market Participant : Schedule Type : Resource Name :	Load Data Submit

5. You will receive a pop-up within a few moments of submitting your revised schedule or forecast, displaying its status. Review the **Submission Result** screen to ensure that your schedule or

File -							
Market Participant :							
Resource Name :							
Bid/Offer Type :	Normal						
Standing Day Type :	ALL						
Schedule Type :							
Update Transaction ID :	43FBP5Vb						
Cancel Transaction ID :							
		Severity	Hour	Code	Action	Description	
		INFO		PMPROC_I_SUBMIT-SUCCESS	Update	Successfully processed the SCHEDULE submission.	

forecast has been successfully submitted. Please note that while not applicable to **Normal** submissions, **Standing Day Type** will return **ALL** in the output file due to default settings.

 Click Export to Excel to produce a spreadsheet of the Submission Result screen, or take a screen print for your records and/or record the Update Transaction ID number. The Submission Result screen cannot be retrieved again. A sample Excel export is included below:

Market Participant :						
Resource Name :						
Bid/Offer Type :	Normal					
Standing Day Type :	ALL					
Schedule Type :						
Update Transaction ID :	43FBP5Vb					
Cancel Transaction ID :						
		Severity	Hour	Code	Action	Description
						Successfully processed the SCHEDULE
		INFO		PMPROC_I_SUBMIT-SUCCESS	Update	submission.

4.3 Cancelling Your Schedule or Forecast

Once you have retrieved your schedule or forecast, you can cancel the data as necessary. Below is an example of what you will see after clicking **Load Data** to retrieve your schedule or forecast.

Schedule (SCH)				
Delivi Standing [Bid Type : Normal C ery Date : 2024/03/22 Day Type : ALL) Standing	Market P Sche Resou	articipant : v dule Type : v rce Name : v	Load Data Submit
Expi	ry Date : yyyy/mm/dd	12			
View -	Clear Hours Copy H	lours detac	h		
Hour	Action	Zero Price	Quantity		
Hour 1	~				
Hour 2	~				
Hour 3	~				
Hour 4	~				
Hour 5	~				
Hour 6	~				

To cancel your schedule/forecast, follow these steps:

- 1. Ensure the **Delivery Date** represents the date of the schedule or forecast you wish to revise.
- 2. New_Submitting-Revising-and-Cancelling-Schedules-and-Forecasts_June14.docxSelect **Cancel** from the drop-down next to the hour number for the hours that you are revising.

View -	Clear Hours	Copy Hours	🚮 Detach	
Hour	Action	Z	ero Price	Quantity
Hour 1	Cancel	\sim		
Hour 2	Cancel	\sim		
Hour 3	Cancel	\sim		

If you wish to cancel a portion of your schedule/forecast and revise a portion of your schedule/forecast, you can do so in the same submission. Simply select **Submit** for those hours that you are revising and follow the steps outlined in Section 4.2, Revising Your Schedule or Forecast.

3. Click **Submit** to send your cancelled schedule or forecast to the IESO.

chedule (SCH)						
Bid Type :	Normal Standin	9	Market Participant :	~		
Delivery Date :	2024/03/22	100	Schedule Type :	\sim		
Standing Day Type :	ALL 🗸		Resource Name :		\sim	
						Load Data

4. You will receive a pop-up within a few moments of submitting your canceled schedule or forecast, displaying its status. Review the **Submission Result** screen to ensure that your schedule or forecast has been successfully cancelled. Please note that while not applicable to **Normal** submissions, **Standing Day Type** will return **ALL** in the output file due to default settings.

File •							
Market Participant :							
Resource Name :							
Bid/Offer Type :	Normal						
Standing Day Type :	ALL						
Schedule Type :							
Update Transaction ID :							
Cancel Transaction ID :	4rNBP5S1						
		Severity	Hour	Code	Action	Description	
		INFO		PMPROC I CANCEL-SUCCESS	Cancel	Successfully processed the SCHEDULE cancellation.	

 Click Export to Excel to produce a spreadsheet of the Submission Result screen, or take a screen print for your records and/or record the Cancel Transaction ID number. The Submission Result screen cannot be retrieved again.

A sample Excel export is included below:

Market Participant :						
Resource Name :						
Bid/Offer Type :	Normal					
Standing Day Type :	ALL					
Schedule Type :						
Update Transaction ID :						
Cancel Transaction ID :	4rNBP5S1					
		Severity	Hour	Code	Action	Description
						Successfully processed the SCHEDULE
		INFO		PMPROC_I_CANCEL-SUCCESS	Cancel	cancellation.



Document Title	Document ID
Introduction to Ontario's Physical Markets	
Market Rules Chapter 7 System Operations and Physical Markets	MDP_RUL_0002_07
Market Manual 4: Market Operations, Part 4.1: Submitting Dispatch Data in the Physical Markets	MDP_PRO_0027

Related Documents

Document Title Document ID Energy Market Interface - Submitting, Revising and Cancelling Energy Market Interface - Submitting and Revising Daily Dispatch Data

Energy Market Interface – Submitting and Revising Forebay Dispatch Data

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