
IESO Gateway User Guide

IESO Training
May 2021



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1. Introduction

Most market participant interfaces and applications are integrated and can be accessed through a single Identity Provider (IdP) service for authentication.

This secure Identity Provider (IdP) service from hereon to be referred as IESO Gateway, provides password management, multifactor authentication (MFA) and single-sign on (SSO) into IESO applications. The IESO Gateway is using Okta as its technology platform.

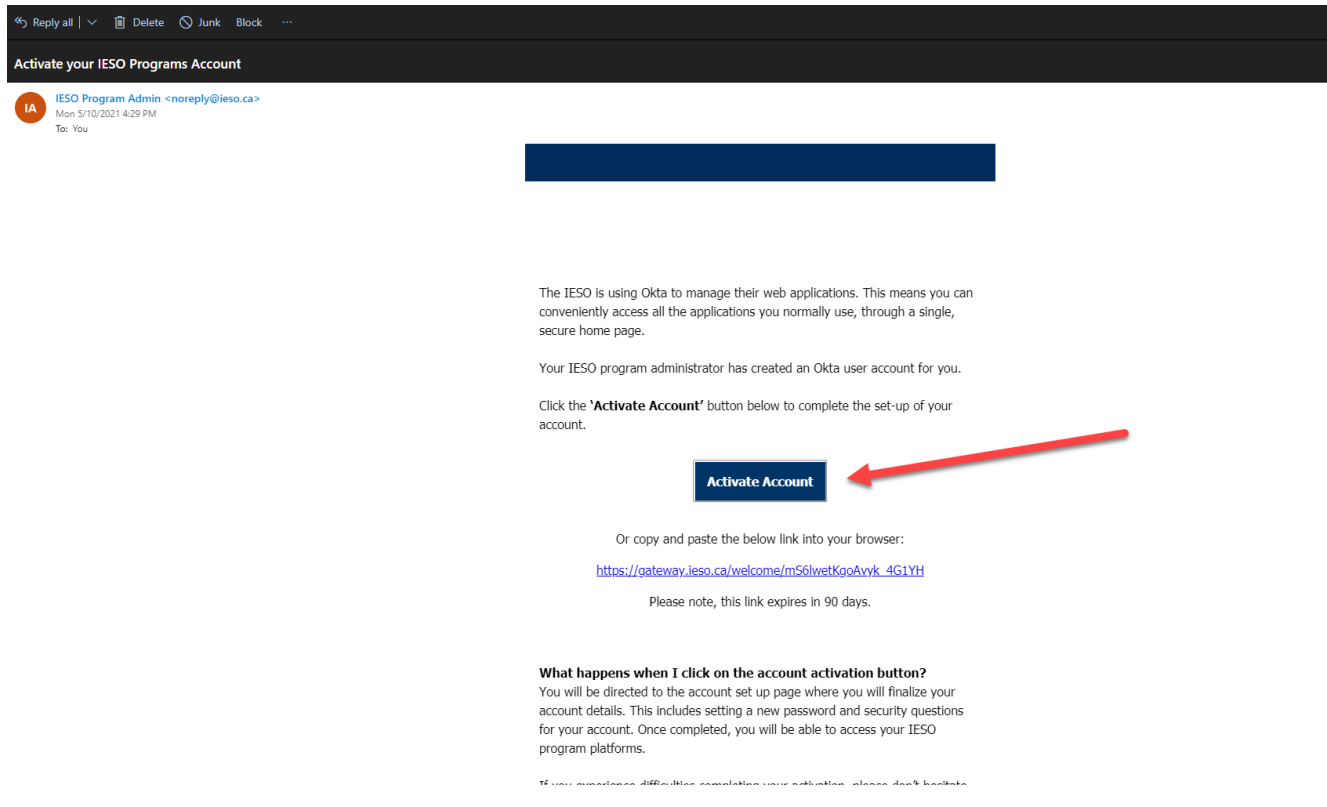
Starting in June 2021, you can use the IESO Gateway to access IESO Workspaces. All other market and program participant interfaces and applications accessed through the IESO Portal (<https://portal.ieso.ca>) will be scheduled to use the IESO Gateway in a release for migration later in 2021, including:

- Submit bids and offers within the real time Energy Market Interface application;
- Access the Online IESO system and the applications hosted within it;
- Access the Outage Management Control Room Operations Window (CROW) application;
- Access the Dispatch Services application;
- Submit and view settlement data via the Settlements application;
- 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 Prudential Manager application;
- Access the Transmission Rights Auction (TRA) System via the Transmission Rights Auction application; and
- Access various collaboration workspaces pages such as the SOE LDC Extranet, Emergency Preparedness, MACD Compliance Enforcement and Monitoring, Demand Response Settlements, Real Time Generation Cost Guarantee 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.

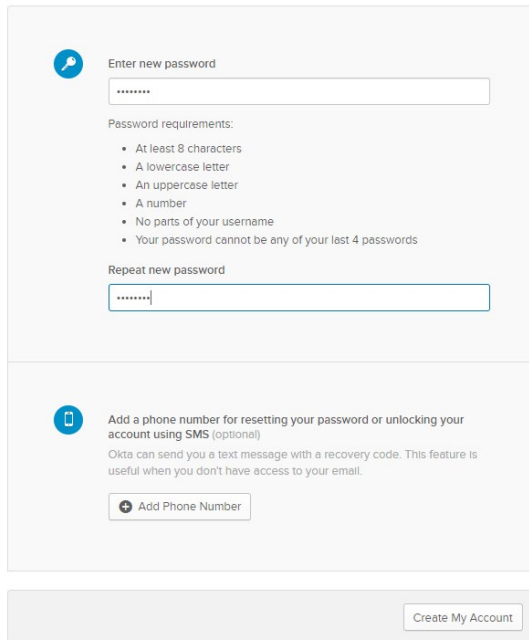
2. Activating your account

When an account is created for you, you will receive an activation e-mail with a link that you can click on in order to activate your account on the IESO Gateway.

Step 1: Click on the “Activate Account” button in the body of the e-mail message:



Step 2: Create a password for your user account that, at minimum, meets the requirements listed and click on the "Create My Account" button to proceed.



Enter new password

Password requirements:

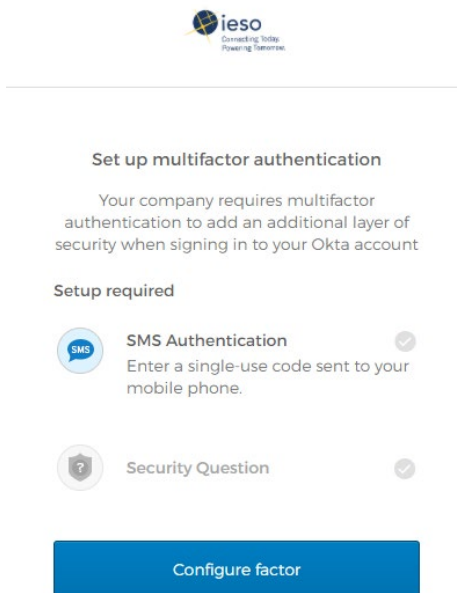
- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

Repeat new password

Add Phone Number

Create My Account

Step 3: Configure your MFA (multifactor authentication) Options, starting with SMS (Text Message) , by clicking on the "Configure Factor" button:



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Set up multifactor authentication

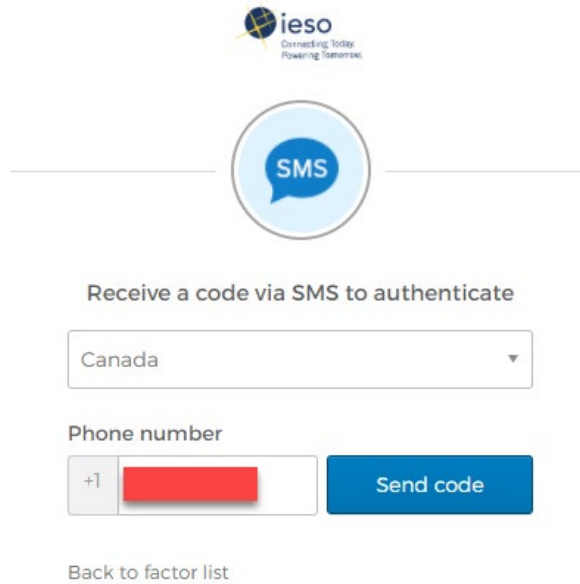
Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

Setup required

- SMS Authentication** ✓
Enter a single-use code sent to your mobile phone.
- Security Question** ✓

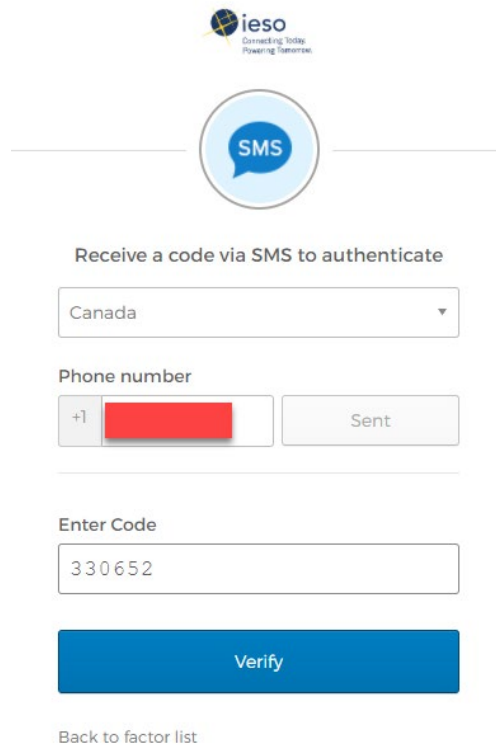
Configure factor

Step 4: Choose a country and enter a valid phone number that can receive SMS (Text Message), then click on the "Send Code" button:



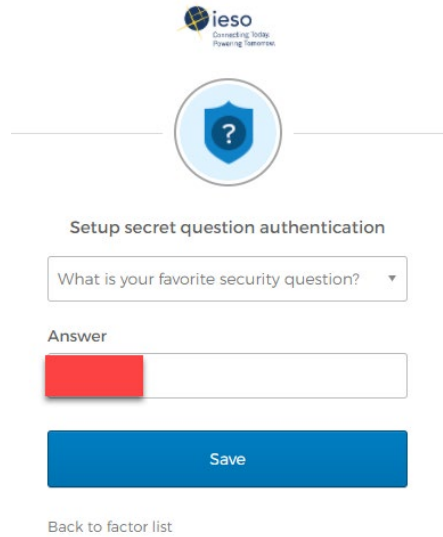
The screenshot shows the IESO Gateway interface for Step 4. At the top is the IESO logo with the tagline "Connecting Today, Powering Tomorrow". Below the logo is a circular icon with a blue speech bubble containing the text "SMS". The main heading is "Receive a code via SMS to authenticate". There is a dropdown menu for country selection, currently showing "Canada". Below that is a "Phone number" section with a field containing "+1" and a redacted area, followed by a blue "Send code" button. At the bottom, there is a link that says "Back to factor list".

Step 5: Enter code received via SMS (Text Message) and click the "Verify" Button:



The screenshot shows the IESO Gateway interface for Step 5. At the top is the IESO logo with the tagline "Connecting Today, Powering Tomorrow". Below the logo is a circular icon with a blue speech bubble containing the text "SMS". The main heading is "Receive a code via SMS to authenticate". There is a dropdown menu for country selection, currently showing "Canada". Below that is a "Phone number" section with a field containing "+1" and a redacted area, followed by a grey "Sent" button. Below this is an "Enter Code" section with a text input field containing the code "330652". At the bottom, there is a blue "Verify" button. At the very bottom, there is a link that says "Back to factor list".

Step 6: Configure the Security Question and Answer MFA Prompt and click "Save"



The screenshot shows the IESO logo at the top center, with the tagline "Connecting Today. Powering Tomorrow." Below the logo is a circular icon containing a shield with a question mark. The main heading is "Setup secret question authentication". There is a dropdown menu with the text "What is your favorite security question?". Below this is an "Answer" field with a red mask covering the first few characters. A blue "Save" button is positioned below the answer field. At the bottom, there is a link that says "Back to factor list".

Step 7: Once MFA Factors are configured, click on the "Finish" button in order to be directed into your User Dashboard.

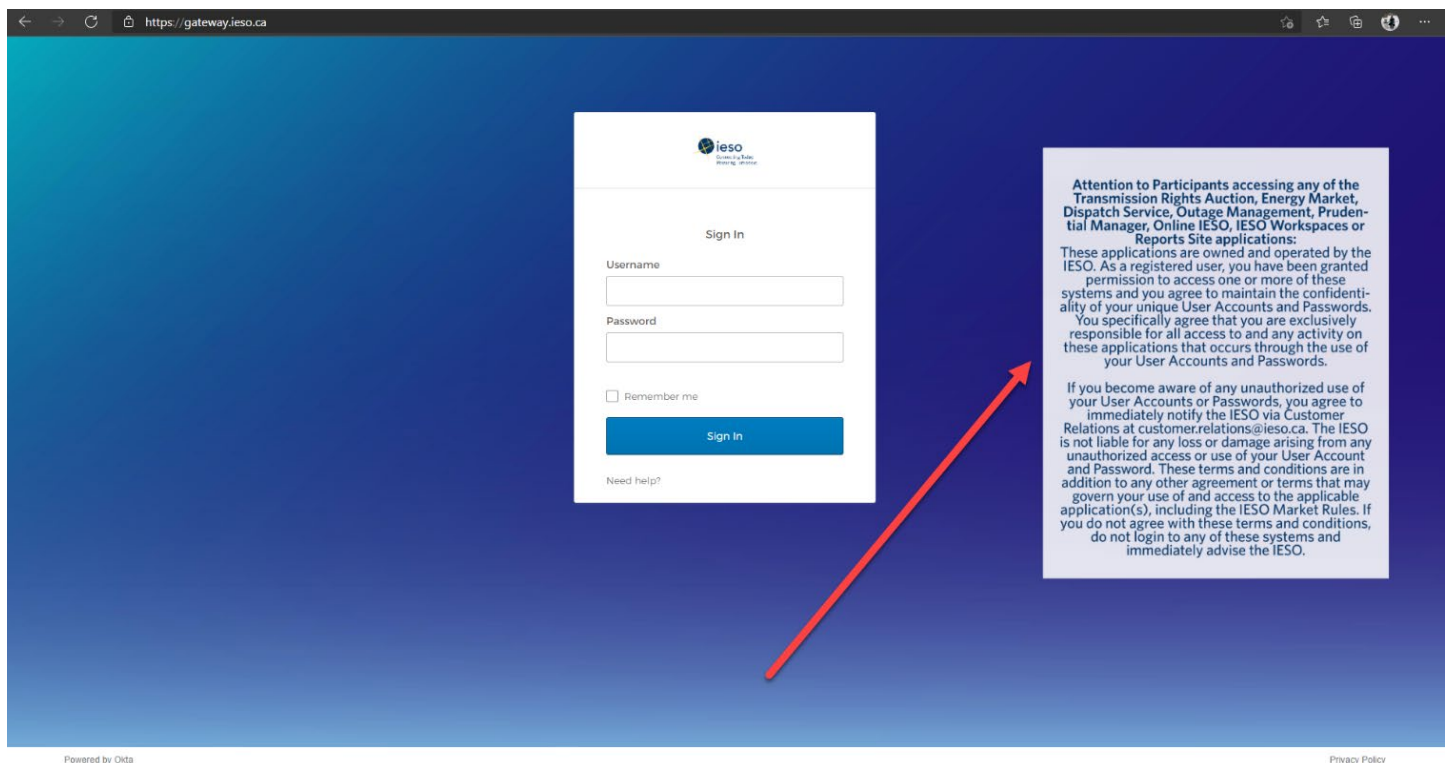
3. Logging in with your User ID and Password

Step 1: Open a web browser and go to <https://gateway.ieso.ca> (The Sandbox Portal URL is <https://gateway-sbx.ieso.ca>).

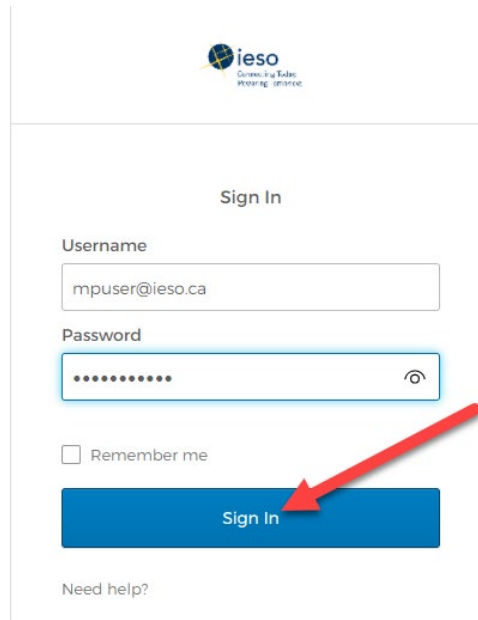
****Ensure that you are using the IESO supported browser and operating system as listed on the Supported Client Platform page available on the IESO Corporate website at: <https://ieso.ca/en/Sector-Participants/Supported-Client-Platforms>**

The IESO Gateway Login screen appears.

Step 2: Read the legal disclaimer on the sign-in page:



Step 3: Enter your username and password and click the "Sign In" Button.



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Sign In

Username
mpuser@ieso.ca

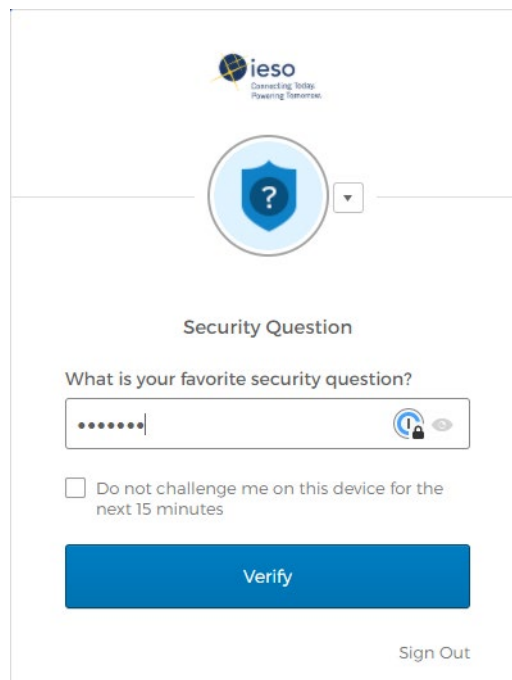
Password
.....

Remember me

Sign In

Need help?

Step 4: Complete your Multifactor Authentication Prompt:



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Security Question

What is your favorite security question?
.....

Do not challenge me on this device for the next 15 minutes

Verify

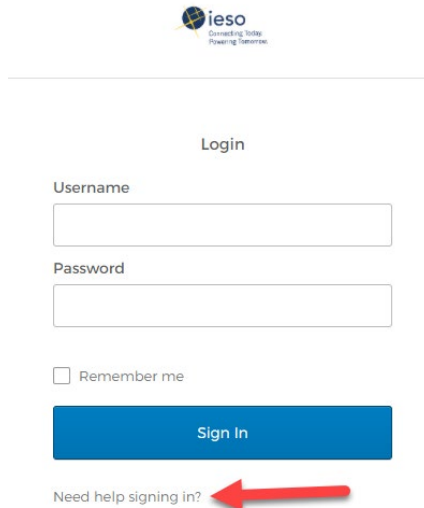
Sign Out

** Optionally : You can choose to check the box to not challenge you on this device for the next 15 minutes, this will ensure that you are not prompted for Multifactor again should you choose to access an application once you are in your User Dashboard.

4. Self-Service Password Reset

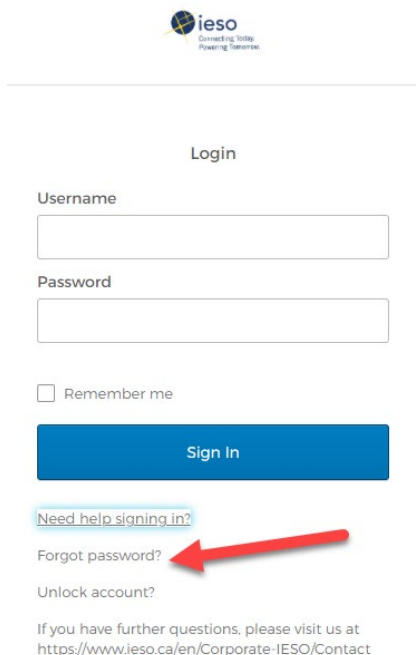
If all requirements mentioned above are in place and you are still having problems, you can attempt a Self-Service password reset via the "Forgot Password?" Link on the login page.

Step 1: Click the "Need help signing in?" text at the bottom of the login box:



The screenshot shows the IESO login page. At the top is the IESO logo with the tagline "Connecting Today. Powering Tomorrow." Below the logo is the word "Login". There are two input fields: "Username" and "Password". Below these is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. At the bottom of the login box, the text "Need help signing in?" is displayed, with a red arrow pointing to it from the right.

Step 2: Click on the "Forgot password?" link below:



The screenshot shows the IESO login page, identical to the one above. However, the "Need help signing in?" link is now highlighted with a light blue background, and a red arrow points to it from the right. Below this link are two more links: "Forgot password?" and "Unlock account?". At the bottom of the page, there is a footer that reads: "If you have further questions, please visit us at https://www.ieso.ca/en/Corporate-IESO/Contact".

Step 3a: Enter your e-mail or username in the field specified, if you had previously added a mobile number for password reset (see section 5), you can use SMS (Text Message) to reset your password by clicking the “Reset via SMS” button:

The image shows two screenshots of the IESO password reset process. The left screenshot is titled "Reset Password" and features the IESO logo at the top. Below the logo is a form with a text input field labeled "Email or Username" containing a redacted name. Below the field is a note: "SMS can only be used if a mobile phone number has been configured." There are two blue buttons: "Reset via SMS" and "Reset via Email". A red arrow points to the "Reset via SMS" button. At the bottom left is a "Back to Sign In" link. The right screenshot is titled "Enter verification code sent via SMS" and also features the IESO logo. It has a text input field labeled "Enter Code" and a "Sent" button. Below these is a large blue "Verify" button. Underneath the "Verify" button is a link: "Didn't receive a code? Reset via email". At the bottom left is a "Back to Sign In" link.

Step 3b: Enter your e-mail or username in the field specified, if you had NOT previously added a mobile number for password reset (see section 5), you can use the e-mail in your profile to reset your password by clicking the “Reset via Email” button:

The image shows two screenshots of the IESO password reset process. The left screenshot is titled "Reset Password" and features the IESO logo at the top. Below the logo is a form with a text input field labeled "Email or Username" containing a redacted name. Below the field is a note: "SMS can only be used if a mobile phone number has been configured." There are two blue buttons: "Reset via SMS" and "Reset via Email". A red arrow points to the "Reset via Email" button. At the bottom left is a "Back to Sign In" link. The right screenshot is titled "Email sent!" and also features the IESO logo. It has a message: "Email has been sent to [redacted] with instructions on resetting your password." Below the message is a large blue "Back to Sign In" button.

Step 4a: Enter the code you receive via Text Message, and click the “Verify” button.

Step 4b: Click on the Reset Password link in the e-mail.

Step 5: Enter a new password that meets the requirements, and click the “Reset Password” Button:

Step 6: If completed successfully you will be directed into the User Dashboard.

5. Password Reset by Administrator

5.1 Password Reset by Administrator, Email

There might be a situation where you cannot recover your own password and will need to have it reset by an Administrator.

****Please note: This option should only be considered after attempts to follow the Self-Service Password Reset steps in Section 4 have failed. Also refer to the Troubleshooting section at the end of this guide.**

In order to initiate the "Password Reset by Administrator" process, you must start by sending an e-mail requesting a password reset to customer.relations@ieso.ca. Please include as much details as possible in this e-mail but at minimum you must include either:

- Your E-mail Address associated with your IESO Gateway Account

OR

- Your IESO Gateway Username (if applicable)

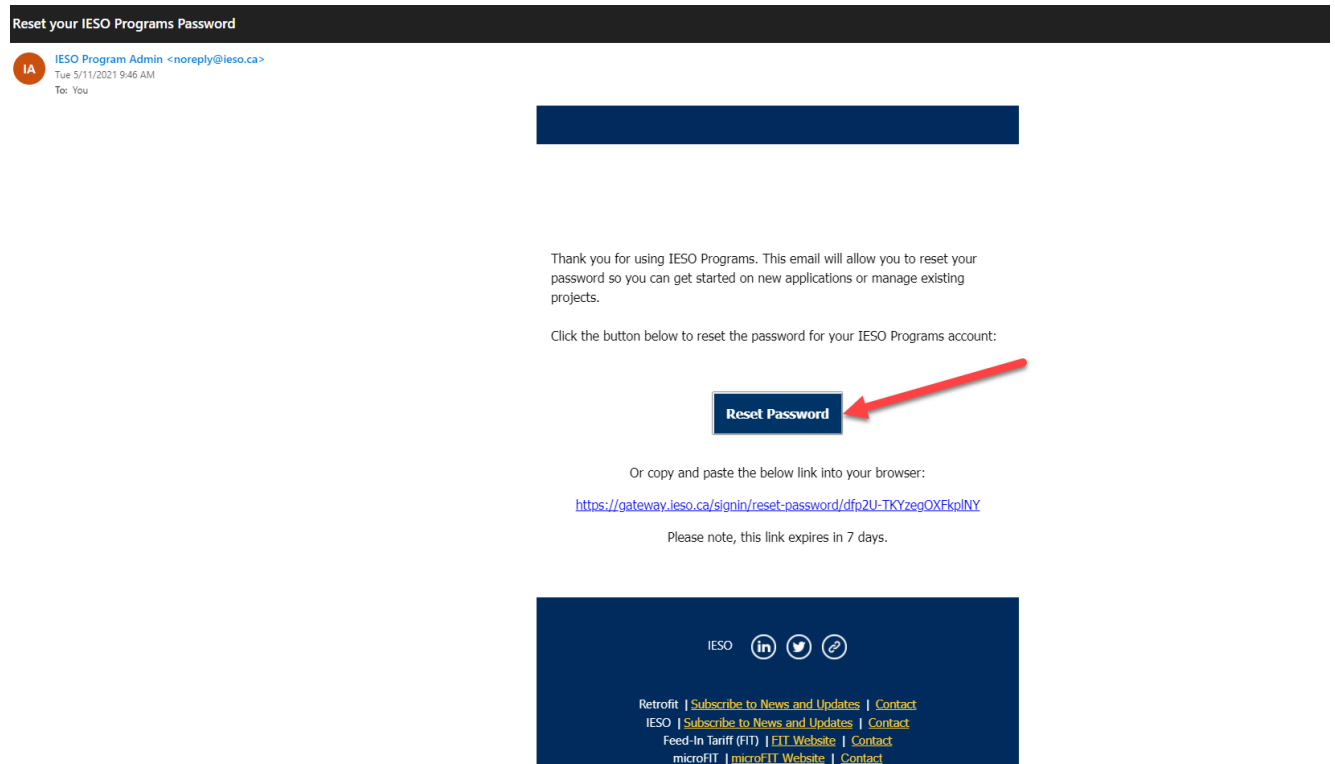
This way the administrators will be able to assist you as quickly and as efficiently as possible.

Once that is complete, there are 2 ways in which an Administrator can assist you. One of these ways is via a Password reset e-mail.

Once the Administrator resets your password, you should receive an e-mail with a "Reset Password" button.

If you receive this e-mail, you can perform the following steps in order to reset your password:

Step 1: Click on the "Reset Password" button in the e-mail body.



Step 2: Type in a new password that meets the requirements listed and click the 'Reset Password' button:

The screenshot shows the IESO password reset form. At the top is the IESO logo with the tagline "Powering Tomorrow". The form title is "Reset your Okta password". Below the title, the "Password requirements:" are listed as follows:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

Below the requirements are two input fields: "New password" and "Repeat password", both containing masked characters (dots). At the bottom of the form is a blue button labeled "Reset Password". Below the button is a "Sign Out" link.

Step 3: Your new password will be set and you will be directed to your User Dashboard.

5.2 Password Reset by Administrator, Temporary Password

Alternatively, If your password is reset by an administrator, you may be given a temporary password which you can use one time to set a permanent password.

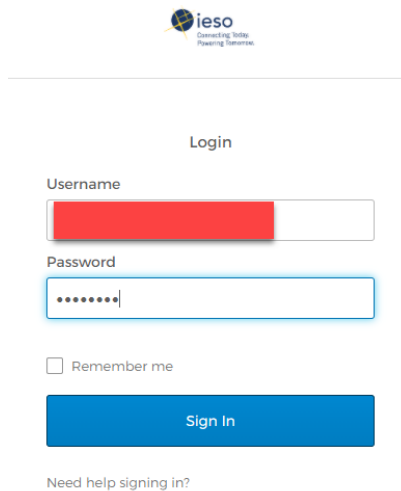
If you have typed in a temporary password, the system will continue to the Reset Your Password screen. When creating a new password, choose one that meets the criteria provided on the page. It should be easy for you to remember, but difficult for anyone else to guess. It is good practice to avoid dictionary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

In order to set a permanent password using this temporary password, please follow these steps:

Step 1: Open a web browser and go to <https://gateway.ieso.ca> (The Sandbox Portal URL is <https://gateway-sbx.ieso.ca>).

**Ensure that you are using the IESO supported browser and operating system as listed on the Supported Client Platform page available on the IESO Corporate website at: <https://ieso.ca/en/Sector-Participants/Supported-Client-Platforms>.

Step 2: 'Sign In' using your username and temporary password that was provided to you:



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Login

Username

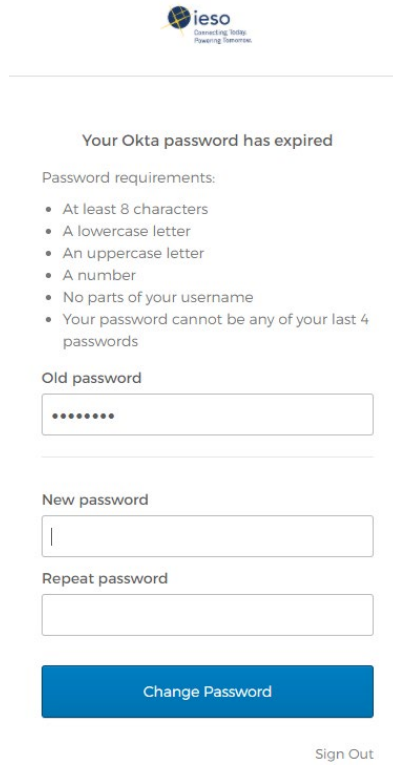
Password

Remember me

Sign In

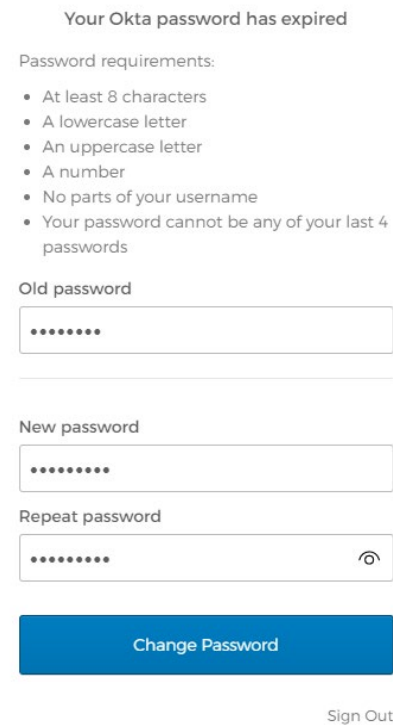
Need help signing in?

Step 3: In the 'Old Password' field, enter the temporary password that was provided to you:



The screenshot shows the IESO logo at the top center. Below it, the text reads "Your Okta password has expired". Underneath, "Password requirements:" are listed with five bullet points: "At least 8 characters", "A lowercase letter", "An uppercase letter", "A number", and "No parts of your username". The fifth bullet point also includes "Your password cannot be any of your last 4 passwords". Below the requirements are three input fields: "Old password" (containing seven dots), "New password" (empty), and "Repeat password" (empty). A blue "Change Password" button is positioned below the fields. At the bottom right, there is a "Sign Out" link.

Step 4: Enter your new password and click 'Change Password' to complete the set-up.

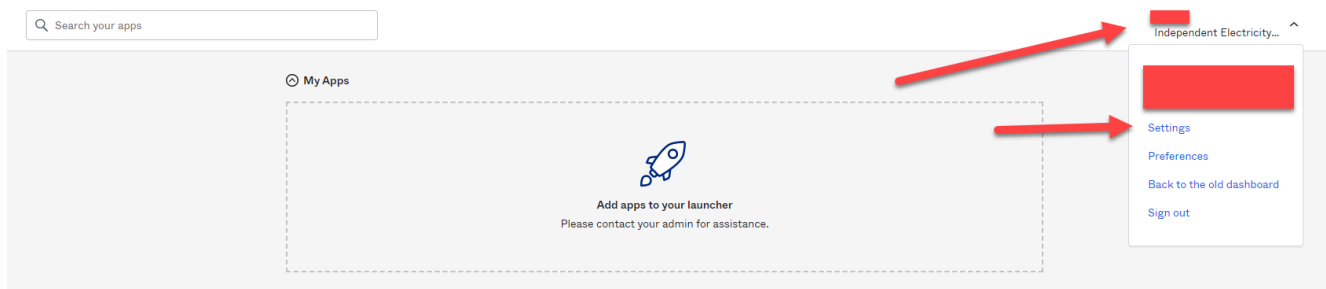


This screenshot is identical to the one above, showing the "Your Okta password has expired" message and password requirements. However, in the "New password" and "Repeat password" fields, eight dots are visible, indicating that a new password has been entered. The "Change Password" button and "Sign Out" link remain the same.

6. Security Profile Options

At any time during the lifecycle of your IESO Gateway account, you can manage your security options from your User Dashboard.

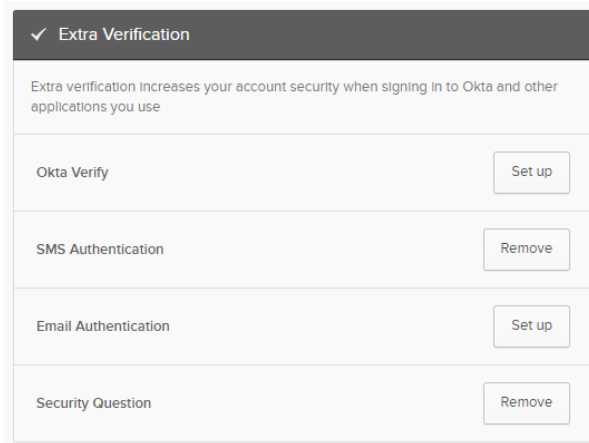
In order to access your profile, click on your name in the top right hand corner of the Dashboard and clicking on the "Settings" button:



Here you can manage settings such as, your password, some aspects of your Profile information, Language and MFA Options:

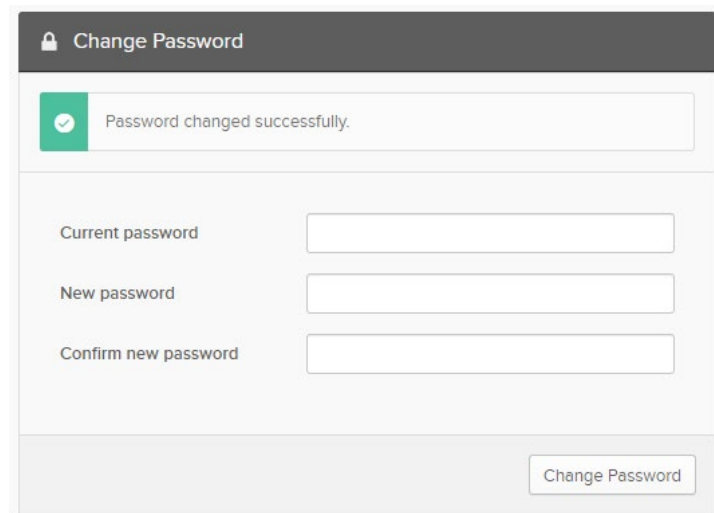
The screenshot displays four settings panels in a grid layout. Each panel has a title bar with an icon and an "Edit" button.

- Personal Information:** Fields include First name (Victor), Last name (Bajada MP3), Okta username (bajadavmp3), Primary email (victor.bajada@outlook.com), Secondary email, Mobile phone, objectGUID, and distinguishedName.
- Change Password:** Includes password requirements: At least 8 characters, A lowercase letter, An uppercase letter, A number, No parts of your username, and Your password cannot be any of your last 4 passwords. It also has input fields for Current password, New password, and Confirm new password, with a "Change Password" button at the bottom.
- Display Language:** Shows Language set to English. A note states: "Your default language has been automatically set by your browser. To change your language please edit and save your desired display language."
- Forgot Password Text Message:** Includes a note: "Okta can send you a text message with a recovery code. This feature is useful when you don't have access to your email." It has input fields for Country (CA) and Phone number ((647) 895-5936).



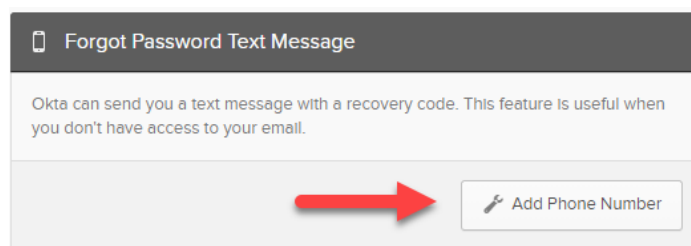
To change your password:

1. Enter your current password into the "current password" box.
2. Enter a new password that meets the requirements listed in the "Change Password" window.
3. Click on the "Change Password" button, if done correctly you will receive a message saying "Password changed Successfully":



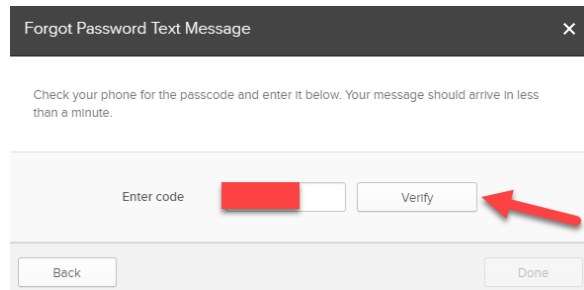
To set up a Forgot Password Text Message:

1. Click on the "Add Phone Number" button in the "Forgot Password Text Message" window:

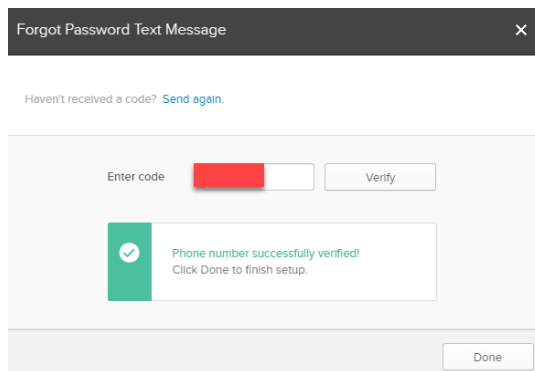


2. In the pop-up, select a country and enter a phone number that can receive Text Messages, then click on Send Code.

3. Enter the code received and click the "Verify" button:

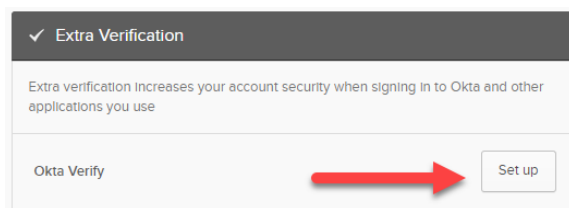


4. If completed successfully, you should receive a message saying "Phone number successfully verified":



To add additional MFA options:

1. Click on the "Set Up" button next to the Multifactor option you wish to configure:



2. Follow the instructions in the prompts.

** Please note, if using Okta Verify, you will need to download the app from the respective App Store (ie. Apple App Store, Google Play Store) before attempting to setup this MFA factor.

7. Troubleshooting

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

- Please use the 'Sign In' links located here: <https://gateway.ieso.ca> (Production) or <https://gateway-sbx.ieso.ca> (Sandbox).
- Ensure that you are using the IESO supported browser and operating system as listed on the Supported Client Platform page available on the IESO Corporate website at: <https://ieso.ca/en/Sector-Participants/Supported-Client-Platforms>
- Ensure that you do not have CapsLock or NumLock turned on.
- If you are unable to access an application once you are in the Dashboard, please check with your company's registered Applicant Representative or Rights Administrator to ensure that you were registered in Online IESO Registration to access the application. Refer to [IESO Roles and Responsibilities](#) for more information.

If you are still experiencing issues, please send any relevant screen shots 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

E-mail: customer.relations@ieso.ca

www.ieso.ca

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System Operator**

1600-120 Adelaide Street West
Toronto, Ontario M5H 1T1

Phone: 905.403.6900

Toll-free: 1.888.448.7777

E-mail: customer.relations@ieso.ca

ieso.ca

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 [linkedin.com/company/IESO](https://www.linkedin.com/company/IESO)