IESO Gateway User Guide

IESO Training
May 2021

Table of Contents

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.
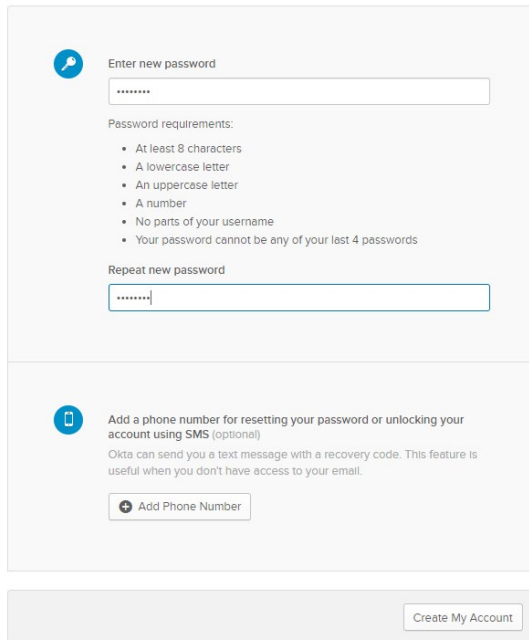
2. Activating your account

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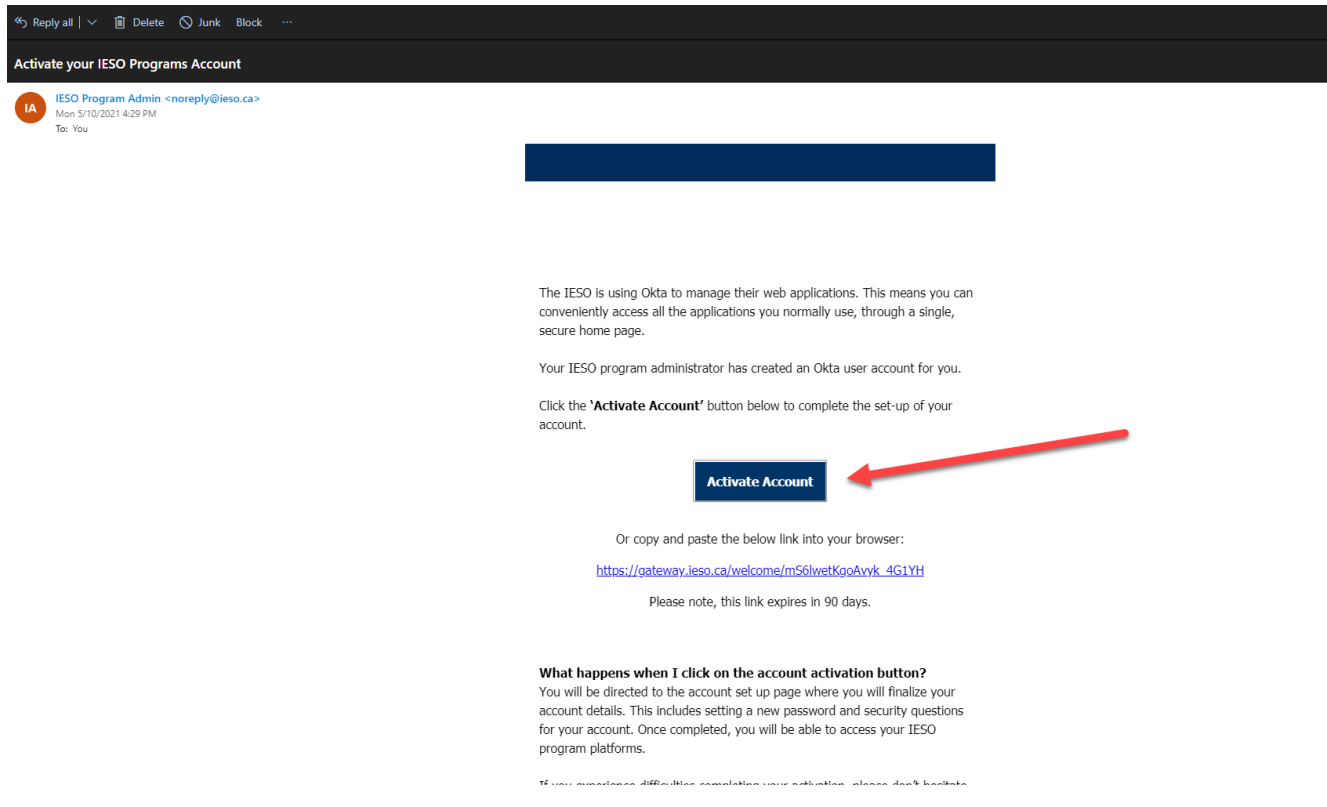
Step 2: Create a password for your user account that, at minimum, meets the requirements listed and click on the "Create My Account" button to proceed.
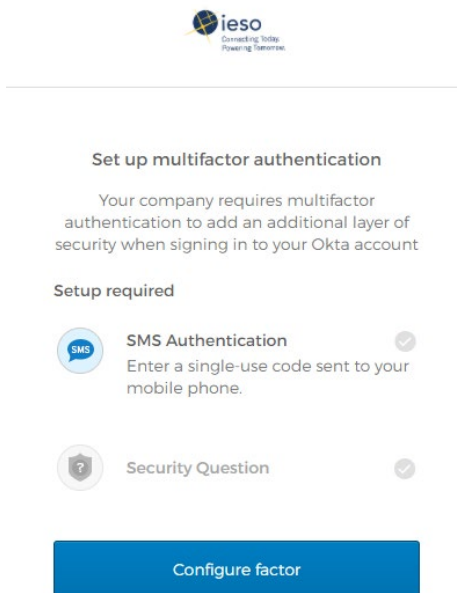

Step 3: Configure your MFA (multifactor authentication) Options, starting with SMS (Text Message) , by clicking on the "Configure Factor" button:
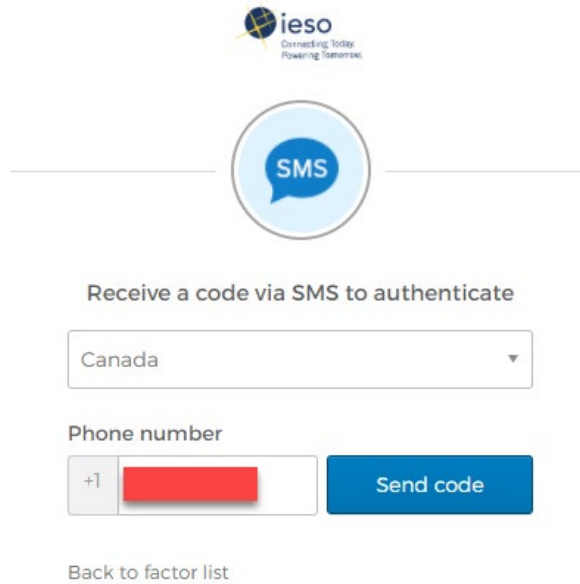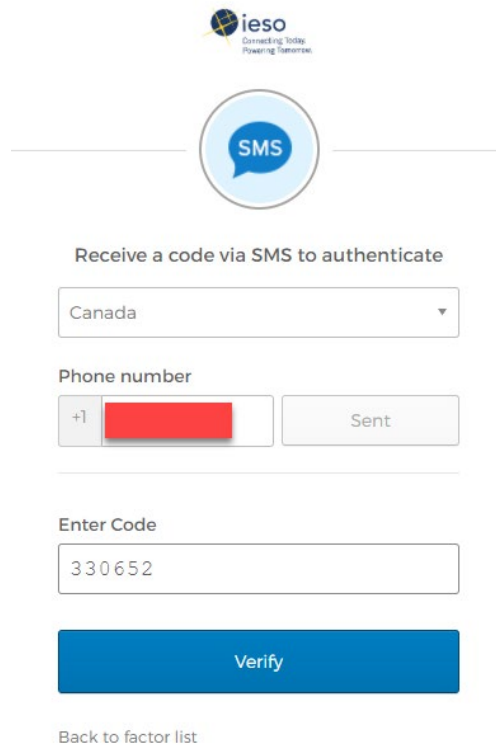
Step 4: Choose a country and enter a valid phone number that can receive SMS (Text Message), then click on the "Send Code" button:
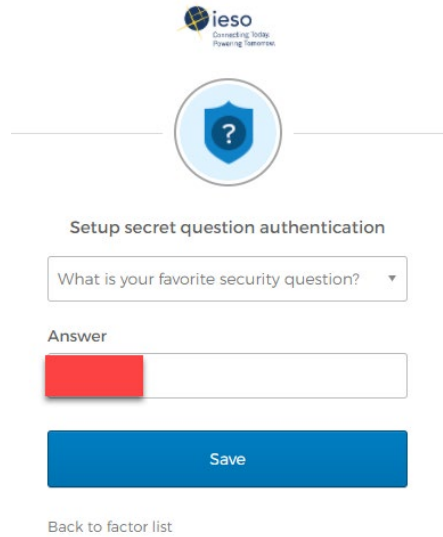

Step 5: Enter code received via SMS (Text Message) and click the "Verify" Button:

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

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).

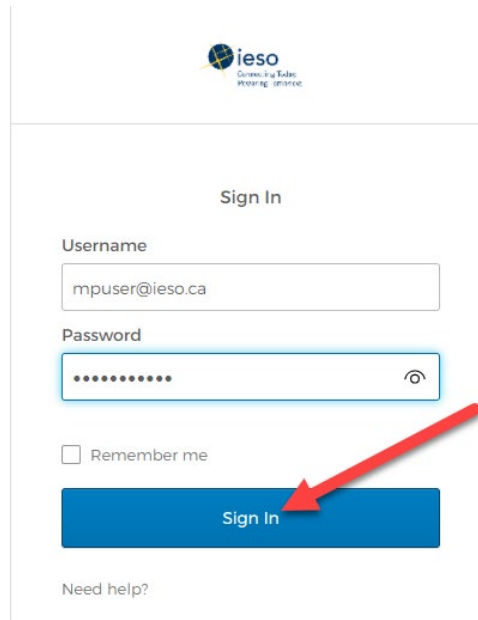**Ensure that you are using the IESO supported browser and operating system as listed on the Supported Client Platform page available on the IESO Corporate website at: https://ieso.ca/en/Sector-Participants/Supported-Client-Platforms

The IESO Gateway Login screen appears.

Step 2: Read the legal disclaimer on the sign-in page:
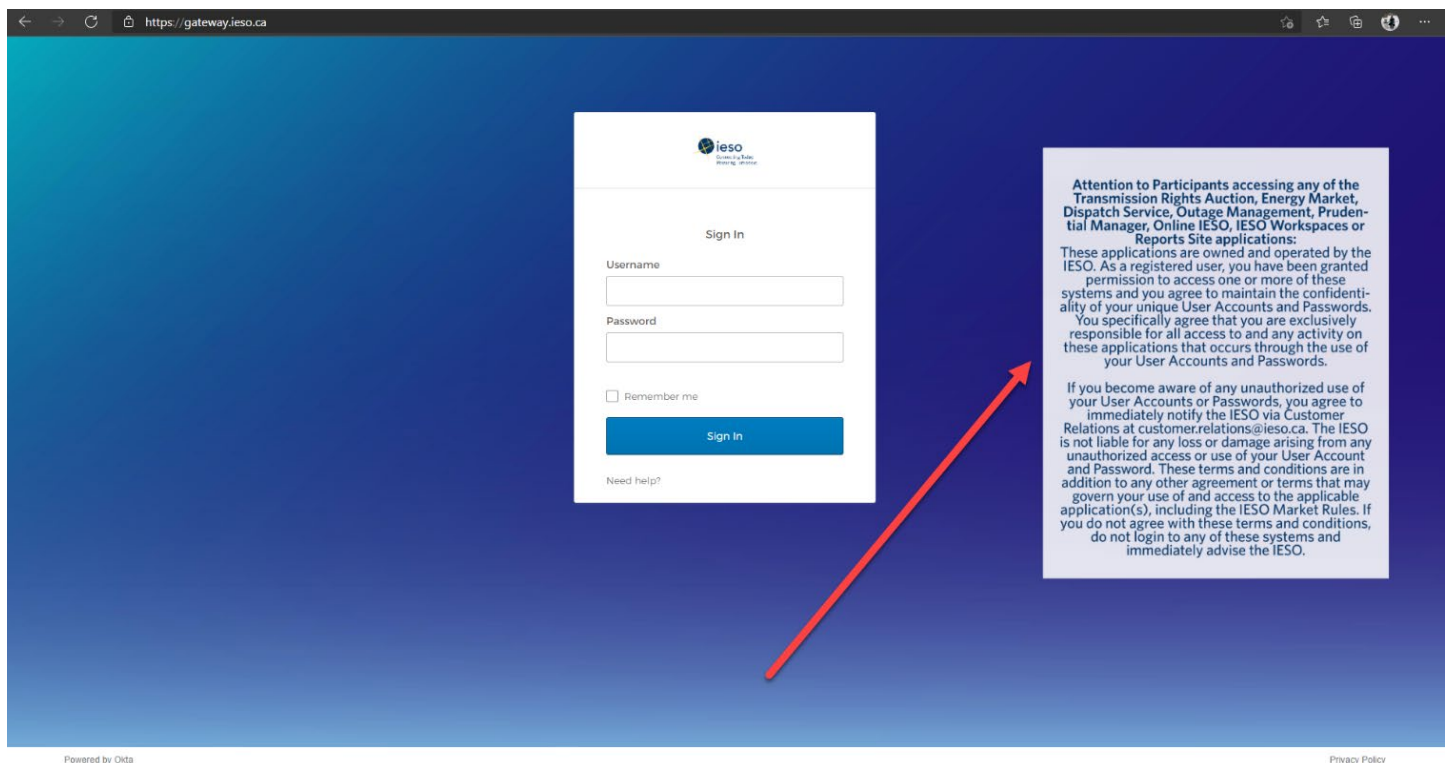
Step 3: Enter your username and password and click the "Sign In" Button.
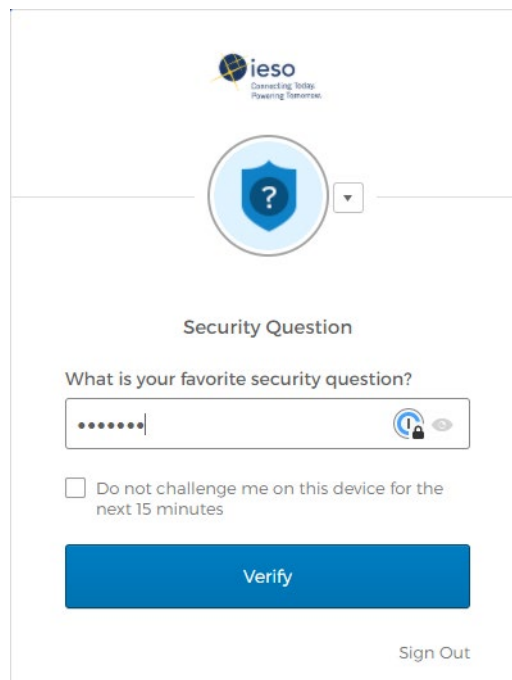
Step 4: Complete your Multifactor Authentication Prompt:
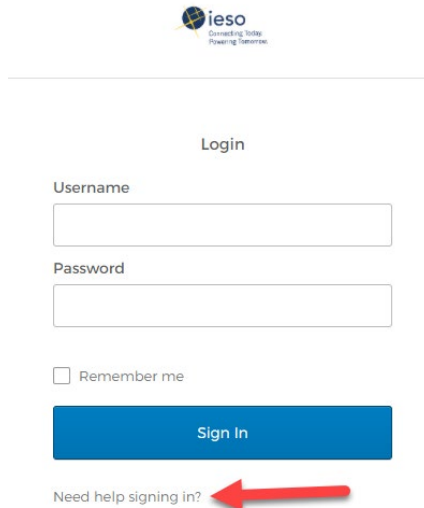

** Optionally : You can choose to check the box to not challenge you on this device for the next 15 minutes, this will ensure that you are not prompted for Multifactor again should you choose to access an application once you are in your User Dashboard.
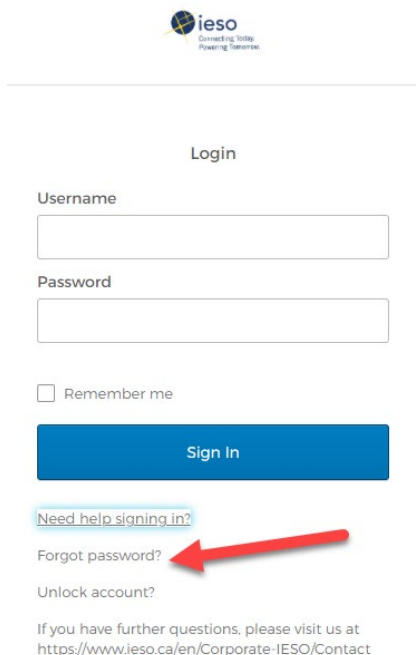
4. Self-Service Password Reset

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:

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

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:

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:

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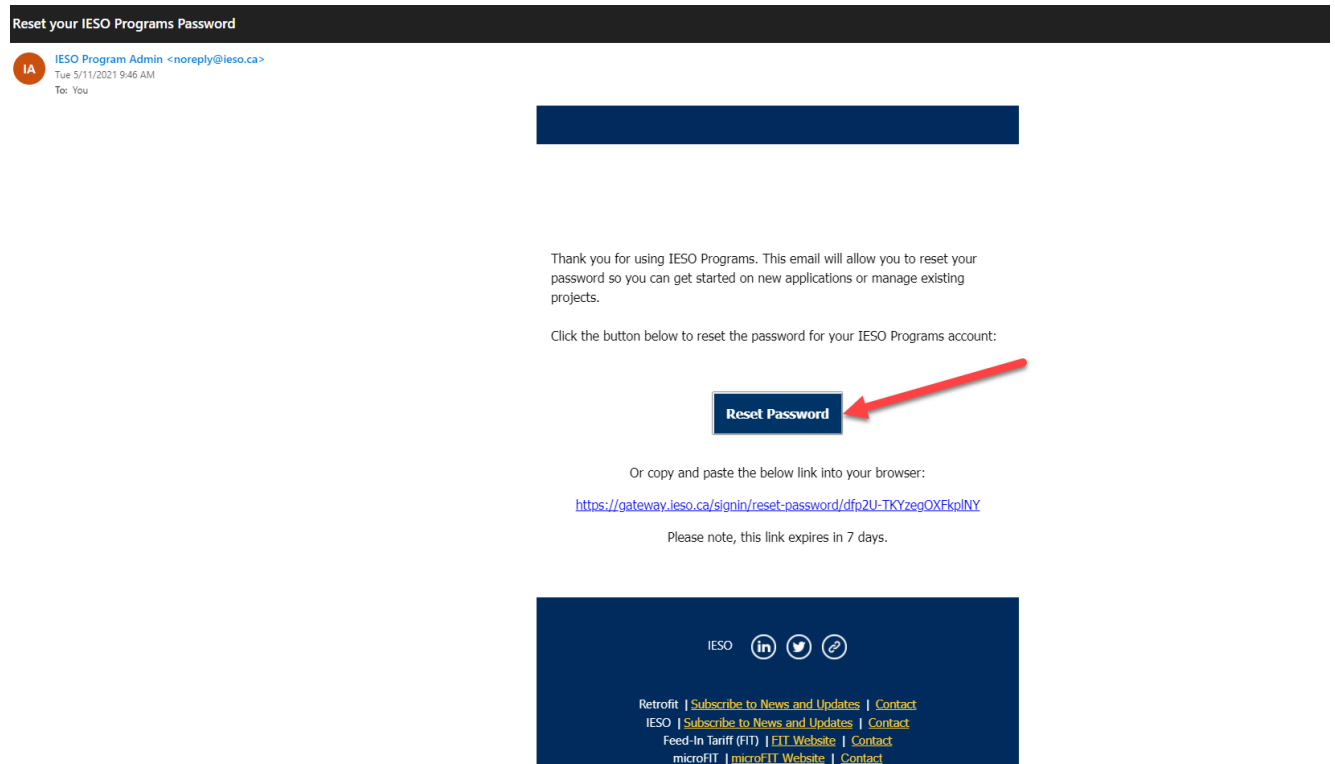
Step 2: Type in a new password that meets the requirements listed and click the 'Reset Password' button:

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.
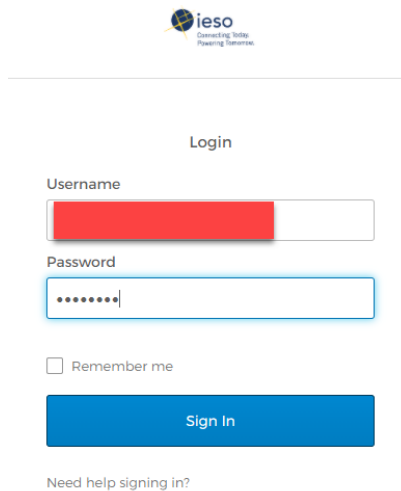
If you have typed in a temporary password, the system will continue to the Reset Your Password screen. When creating a new password, choose one that meets the criteria provided on the page. It should be easy for you to remember, but difficult for anyone else to guess. It is good practice to avoid dictionary 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:
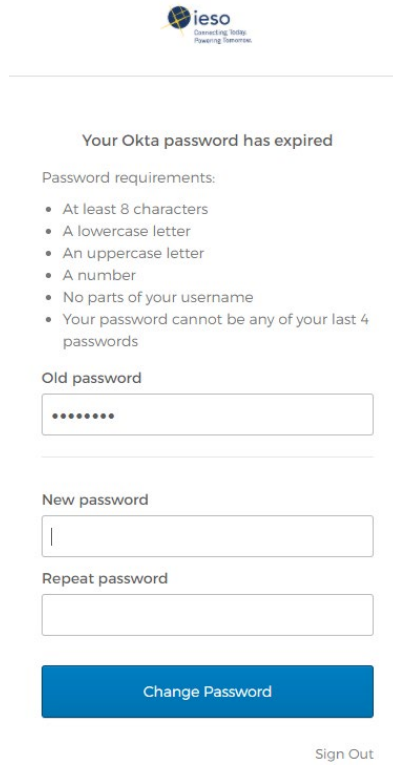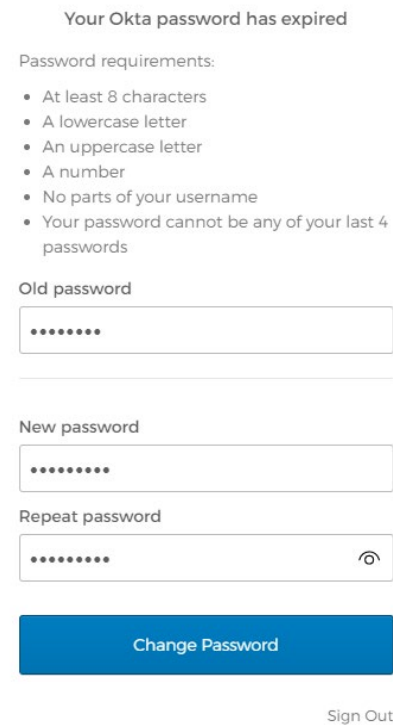
Step 3: In the 'Old Password' field, enter the temporary password that was provided to you:

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

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.
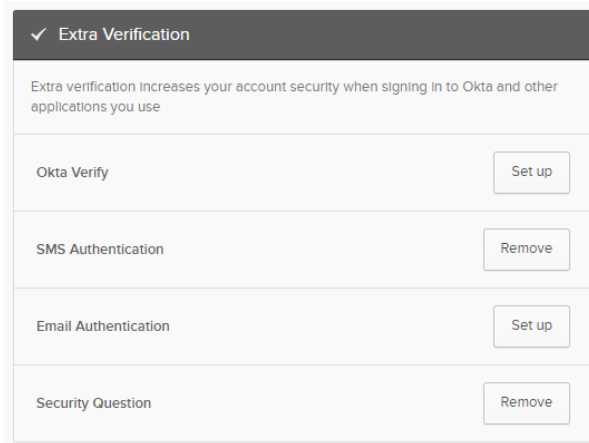
In order to access your profile, click on youe name in the top right hand corner of the Dashboard and clicking on the "Settings" button:
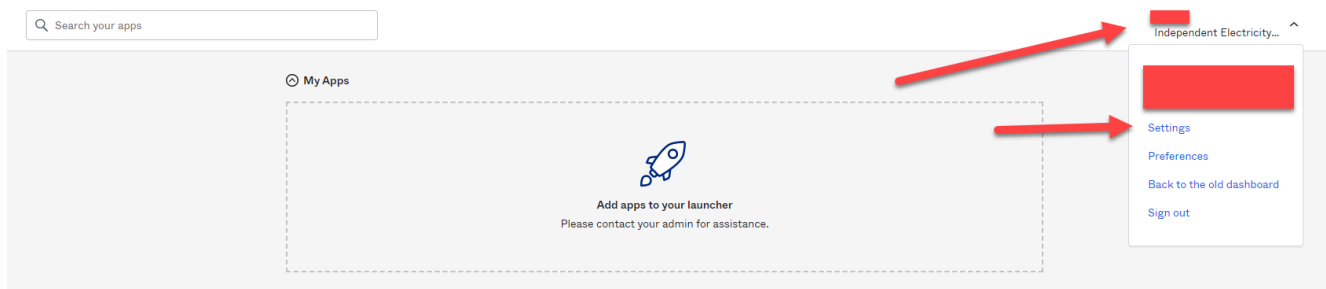
Here you can manage settings such as, your password, some aspects of your Profile information, Language and MFA Options:
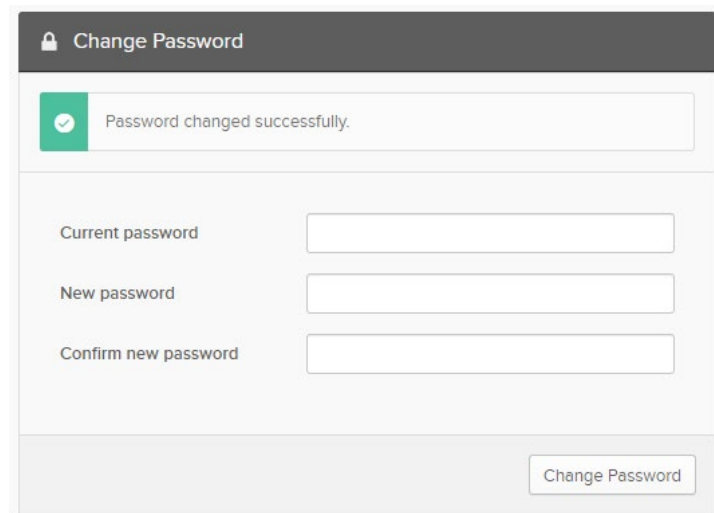
To change your password:

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":
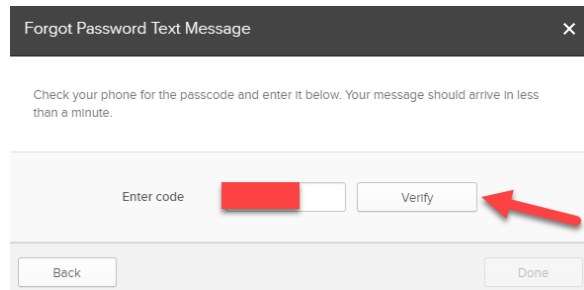

To set up a Forgot Password Text Message:

1. Click on the "Add Phone Number" button in the "Forgot Password Text Message" window:
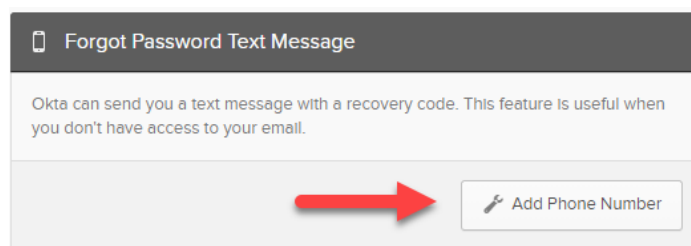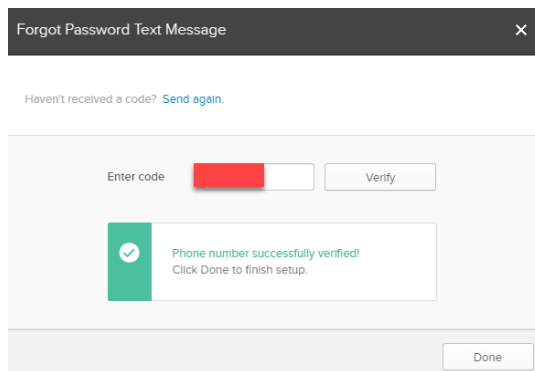
2. In the pop-up, select a country and enter a phone number that can receive Text Messages, then click on Send Code.

3. Enter the code receivied and click the "Verify" button:
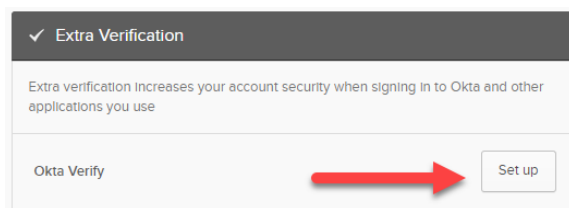
4. If completed successfully, you should receive a message saying "Phone number successfully verified":

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 Responsibiities 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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