Retrieving Reports via the IESO Reports Site

Issue 16, Revised October 25, 2024

Introduction

This edition of Quick Takes provides instructions for viewing reports via the IESO Reports site.

Participants use the Reports site to retrieve confidential reports such as settlement statements, invoices, operational reports and dispatch advisories, as well as some IESO public reports.

You need only a username and password to access your confidential reports via the password-protected section of the Reports site – you do not need to use a PKI certificate.

Background

Both public and confidential reports are available on the IESO Reports site. The majority of reports are in XML format (see Quick Take 12: Accessing IESO Reports Formatted in XML).

The Consolidated Report Listing, available on the Technical Interfaces page, provides a complete listing of our reports, where they are available and in what file format, as well as the report retention period. For many reports, you can:

- View the most recent version of the report
- View the latest version of the report within a specific reporting time period
- Automatically refresh while viewing a report
- Use filtering and sorting options

Accessing the Reports Site

RETRIEVING PUBLIC REPORTS

Step 1: Type the URL https://reports-public.ieso.ca into the address line on your browser

Step 2: To view public reports, select **Public Reports**

The list of IESO public report folders appears.

Step 3: Click on the report folder you wish to view.

The list of reports available within the folder appears:

Link to the most recent update (also called the 'global link')

Note that the first file listed has no date/time or version number. It always links to the most recent version of the report. In this example, the file named

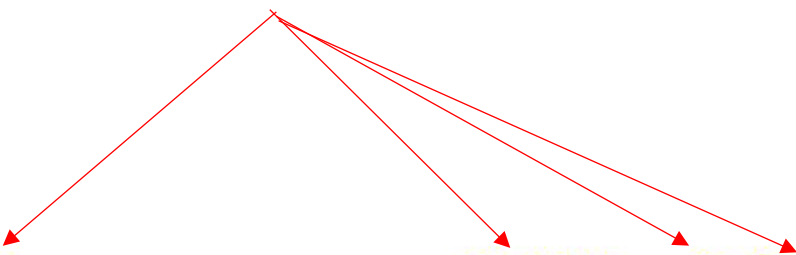**PUB_GenOutputCapability.**xml is the most recent version of the Generator Output and Capability report.

Link to the most recent update within a specific reporting time period (also called the 'local link')

You can also link to the most recent report within a specific reporting period. For example, you can use the link to view the most recent report for a specific date. The file name has the date or date/time, but no version number. In this example, the file named **PUB_GenOutputCapability_20240312.**xml is the last version issued of the *Generator Output* and Capability report for March 12, 2024

Sorting and Searching/Filtering

You can sort the files by Name, Last Modified, Size or Description – in either ascending or descending order.

Name	Last modified	Size	Description
Parent Directory		-	
PUB_GenOutputCapability.xml	12-Feb-2024 11:16	411K	Generator Output and Capability Report
PUB_GenOutputCapability_20231113.xml	14-Nov-2023 00:17	867K	Generator Output and Capability Report

If you wish to refine your search, you can add information (filters) to the URL. The filtering conventions are similar to those used for DOS and UNIX. Below are a few examples of filters you may find useful. In all cases, simply replace the report name if you wish to filter for a different report. Keep in mind that you can bookmark web pages once you have applied the desired filters. (For IESO report naming conventions, please refer to External Document Naming Convention, Information Technology Standard available via our Technical Interfaces web page, under 'XML and Automated Documents'.)

Filtering Examples

To go directly to the Generator Output and Capability report folder, change https://reports-public.ieso.ca/public/ to https://reports-public.ieso.ca/public/GenOutputCapability/ then press **Enter**.

To view the Generator Output and Capability reports for February 12, 2024, add a date filter to the URL: **PUB_GenOutputCapability_20240212.xml**

RETRIEVING CONFIDENTIAL REPORTS

To access your confidential reports, enter https://reports.ieso.ca/private/MPname/ in the URL address field, or select **Participant Reports** from the public URL entry page.
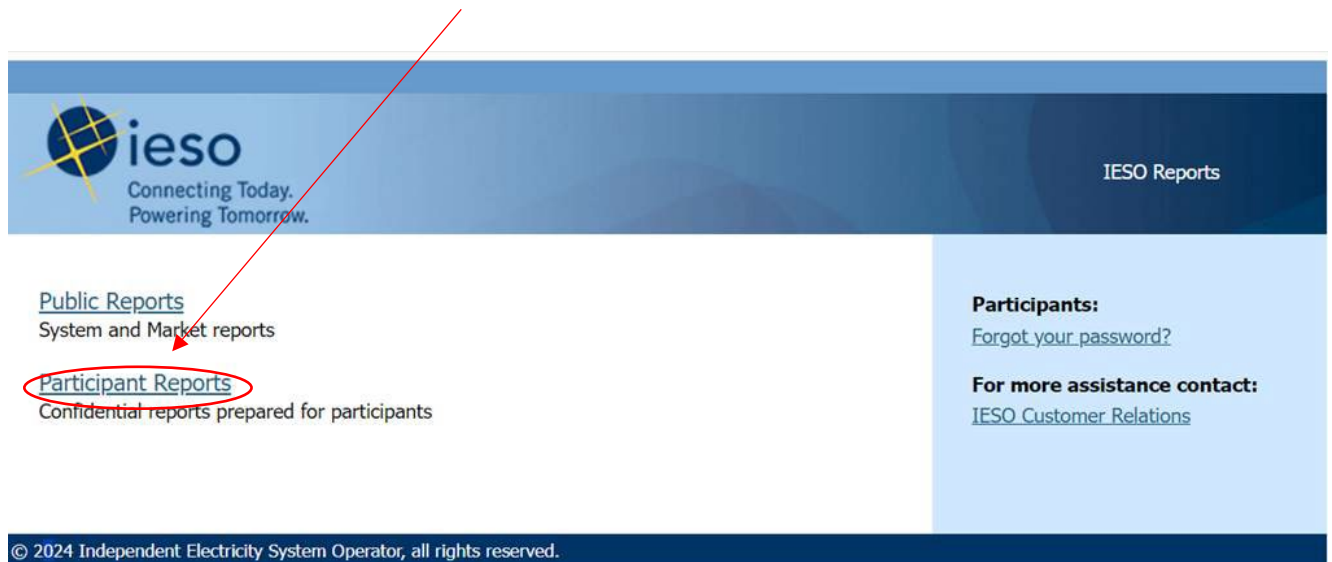
The logon pop-up window appears:

Enter your gateway user ID and password to access your reports (If you need a username and password, please contact your Online IESO Applicant Representative.)

Active gateway account is required, and your accounts needs to assigned to an applicable contact role(s) or system access role(s). For more information, refer to Guide for all Contact Roles (ieso.ca)

Available Features

Note that all the features available for public reports (link to latest version, sort and search/filtering capabilities) are also available for confidential reports

What an automatic refresh looks like when available for dispatch advisories

Automatic Screen Refresh

An automatic screen refresh option is available for dispatch advisories. If you click on the file named **refresh.htm**, the report will automatically refresh every 30 seconds.

When you are viewing the report, a message in the bottom left corner of the screen tells you when the next refresh is expected, **e.g., Screen will refresh in 28 seconds.**

Note: At this time, the public reports and other confidential reports do not offer the automatic refresh feature. If you wish to refresh the screen while viewing these reports, click the Refresh button on your browser, or right click your mouse, then click **Refresh**.

Report Retention

The Consolidated Reports Listing, available on our Technical Interfaces web page, lists the number of days we will leave each report on the Reports site. If you need to access reports that are no longer on the Reports site, please contact Customer Relations.

Version Retention

Please note that we will remove the report 'versions' after 10 calendar days, leaving only the most recent update (global link), the most recent update within a specific reporting time period (local link) and the latest version (the 'latest version' points to the same document as the local link) – see page 3 for examples.

Summary

You can retrieve many public reports and all of your confidential reports (including your settlement statements, invoices, and operational reports) via our Reports web site.

Additional Information

- For information on viewing, downloading and printing IESO reports formatted in XML, please see Quick Take 12: Accessing IESO Reports Formatted in XML

- For information on the application programming interface (API) for automating retrieval of XML reports, see the Outbound Automated Document, Application Programming Interface (IMO_SPEC_0100), available on our Technical Interfaces web page.

- To obtain a username and password, please contact us at:

  Toll Free: 1-888-448-7777

  Tel: (905) 403-6900

  Fax: (905) 403-6921

  Email: customer.relations@ieso.ca