

2018 Initiatives : Metering Installation Registration Tool (MIRT)

- This tool enables the metering service provider to provide the IESO with a MDAS Master File.
- The IESO is looking to replace the MIRT (declining support of the existing visual basic platform / look to streamline the process)
- We are targeting to start this project in early 2018 (project brief / business case / visioning)

Metering Installation Registration Tool (MIRT)

Some items for consideration:

-Incorporating all meter passwords. Passwords should be readily available to the IESO in accordance with Chapter 6, Section 9.2 of the market rules:

Each metering service provider shall hold '**read-only**', '**read plus synchronize time**' and '**read plus write**' passwords for each metering installation for which it is the metering service provider, where available, and shall forward a copy of such passwords to the IESO.

-Incorporate a robust validation process of the master file by utilizing the metering registry information currently residing in our systems

Metering Installation Registration Tool (MIRT)

Some items for consideration:

revisit the 500+ fields in the master file and determine IESO controlled fields and MSP controlled fields

- There will be opportunities for the metering community to provide input through IESO's external stakeholder process.

OVERVIEW – FORM AUTOMATION

1. Purpose
2. Current status
3. Immediate next steps
4. Future vision

Relationship automation is a tool in online IESO which allows stakeholders to implement business role changes

PURPOSE – FORM AUTOMATION

EFFORT

- Submission of completed paper forms required
- RFC implementation
- Verification and archiving
- ~20 Transitions in the past year
- Limited IT resources

ACCURACY

- Internal and external manual work required. Increases potential for error.
- Translating forms is often cause of errors
- All MSP transitions in the past year had significant errors

AUDIT

- Auditors review these practices

Total business hours saved could be up to 20 hours per transition and quicker turnaround for MSP's

CURRENT STATUS – FORM AUTOMATION

- New Online IESO tasks to allow seamless changes
- Relationship changes executed online
 - MSP Transfer
 - MMP/T Transfer
 - MDA Assignment
- Implementation Status
 - Form 1299, 1300 (MSP, MMP) basic functionality implemented

Owner's, MSP's and MMP's can manage relationship changes directly via Online IESO. No forms.

NEXT STEPS – FORM AUTOMATION

- Working with Market Registration to agree on end state
- Finalizing existing functionality
 - Form 1299, 1300 monitoring and permissions in progress
 - Form 1301 (MSPT), 1390 testing in progress
 - Bulk transfer accommodation

Test Case	Responsible	Pass/Fail	Test details
1. Owner initiates MSP change			
a. Owner can assign new MSP/MSPT to start	Samir	pass	
b. Owner cannot assign new MSP/MSPT to start	Samir	pass	
c. Owner can assign new MSP/MSPT to start	Samir	fail	Task is lost
d. Cannot select organization who does not have the participation role	Samir	pass	These organizations are available in the portal, but are not listed in the dropdown menu of the organization selection.
e. Cannot select role before participation is effective date	Samir	fail	Users can select a role before the participation is effective.
f. Owner should not be able to assign MSP for MSP/MSPT role (except administrators)	Samir	pass	
g. IESO can remove?	Samir	pass	
h. IESO can request request and Owner can modify	Samir	fail	
i. IESO can add/remove a case for meter installation point (real or virtual)	Samir	fail	
2. MSP changing MSP			
a. MSP can change MSP for a site	Samir	pass	
b. MSP can change MSP for multiple sites	Samir	fail	Fail - unable to proceed with task to change multiple assignments from the role.
c. MSP can change MSP role	Samir	fail	Fail - unable to proceed with task to change multiple assignments from the role.
d. MSP can change IESO (?) role	Samir	fail	Fail - unable to proceed with task to change multiple assignments from the role.
e. IESO can request request and Owner can modify	Samir	fail	Fail - unable to request IESO from owner.
f. IESO can request request?	Samir	pass	
g. Owner MSP can request request new assignment?	Samir	pass	pass - unable to proceed as new meter.
h. MSP cannot assign role within 21 days	Samir	pass	pass - unable to proceed as new meter.
i. Cannot start a role before participation effective date	Samir	pass	
j. Owner should not be able to assign MSP for MSP/MSPT role (except administrators)	Samir	pass	
k. IESO can add/remove a case for meter installation point (real or virtual)	Samir	fail	Fail - unable to add virtual meters.
3. Status reports and monitoring			
a. IESO should be able to view data for all representatives(?)	Samir	fail	Fail - attached picture demonstrated this is not possible.
b. IESO can view data from a single representative?	Samir	fail	Fail - not really able to view data from a single representative.
c. IESO can view data from a single representative by name?	Samir	fail	Fail - not really able to view data from a single representative by name.
d. IESO can view data from a single representative by name?	Samir	fail	Fail - not really able to view data from a single representative by name.
e. IESO can view data from a single representative by name?	Samir	fail	Fail - unable to view data that submitted the request. Only information.

You have accepted this task. Return task to all assignees. SAVE DRAFT REASON REJECT

Review Delivery Point MSP Transfer Request

Request Details

News Tasks (39) Records Reports Actions

Request # 3197

MSPs for the following list of delivery points. Please review the meter installation list and lot use one of these primary delivery points but reside at the same facilities with the same

Meter Service Provider	Transfer Effective Date
I-SGI TECHNOLOGIES INC. (MSP)	10/5/2017
I-SGI TECHNOLOGIES INC. (MSP)	10/5/2017
I-SGI TECHNOLOGIES INC. (MSP)	10/5/2017

SEARCH

Manage Facility Requests (IESO)

Tasks for Request #0 / Started: 9/11/2017 11:50 AM EST - Status: In Progress

Tasks for Request #0 / Started: 9/11/2017 11:00 AM EST - Status: In Progress

Tasks for Request #0 / Started: 9/8/2017 12:18 PM EST - Status: In Progress

New Meter Service Provider	Transfer Effective Date	
N-SGI TECHNOLOGIES INC. (MSP)	Oct 5, 2017	X
N-SGI TECHNOLOGIES INC. (MSP)	Oct 5, 2017	X
N-SGI TECHNOLOGIES INC. (MSP)	Oct 5, 2017	X

COMPLETE

System needs additions and coordination with Market Registration

FUTURE – FORM AUTOMATION

- Fully automated process with several automated checks
- MSP effort, control and high accuracy results

No forms

Baseline Update - No Load Loss

Robert Stancu, Senior Technical Officer,
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December 12, 2017

Outline

- Background
- Need
- Next Steps



Background

- Last year, the IESO targeted two initiatives to incorporate in Baseline 37.1 of Market Manual 3.7
 - Dynamic Loss Allocation
 - No Load Loss under disconnected supply
- Due to the magnitude of the scope of the Dynamic Loss Allocation methodology, no additional content beyond Dynamic Loss Allocation could be incorporated into Baseline 37.1

Need

- Under specific configurations, supply can be disconnected such that transformers do not consume No Load Loss
- It is possible in these instances that MMPs will still incur No Load Loss consumption
- IESO is developing a methodology that would enable MMPs to avoid this No Load Loss

Next Steps

- Methodology to be developed in greater detail – Spring 2018
- Presentation at Spring 2018 RMSC meeting
- Target September Baseline for update to Market Manual 3.7

Revision of the Wholesale Revenue Metering Standard - Hardware

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December 12, 2017

Outline

- Background
- Need for Revision
- Objectives
- Approach
 - Methodology for review
 - Stakeholder input
- Planned Next Steps

Background

- The first issue of the “Wholesale Revenue Metering Standard – Hardware” (“the Hardware Standard”) was published in December 1999
- The current issue of the Hardware Standard was published in September 2015
- Over the course of those ~16 years, there have been a total of 11 issues of the Hardware Standard
- Each successive issue contained amendments to address particular situations

Need for Revision

- Over time, a significant number of amendments have accumulated and have introduced (what seems like today) a lack of clarity in the Hardware Standard.
 - Resulted in participants designing compliant *meter installations* subject to interpretation.
 - Resulted in the IESO's assessment of *meter installations* for *market rules* compliance to be subject to interpretation.
- Description of the acceptable circumstances for “exceptions” could be improved.
 - E.g. common bus VT, dual secondary VT shared with P&C
 - Resulted in unintended use of exceptions, and has allowed for Declaration of Compliance (“DOC”) based on interpretation.

Objectives

- To clarify the existing Hardware Standard
 - There is no intent to introduce new content to the Hardware Standard
 - If new content is determined to be required during the course of the Hardware Standard review, then it will be communicated using established processes
- To recognize DOC and Alternative Metering Installation Standard (“AMIS”) in the Hardware Standard as opposed to “new” and “existing”
 - All new or substantially upgraded installations must achieve DOC
 - Existing installations that are compliant under AMIS must achieve DOC once substantially upgraded
- To distinguish the standard from exceptions recognized in the Hardware Standard
 - Exceptions will be further clarified by the acceptable circumstances that they may apply

Approach – Methodology

- Gather information
 - Review redline versions of previous issues of the Hardware Standard in detail
 - Review presentations or submissions of background information pertaining to Hardware Standard amendments in detail
- Catalogue the intent of previous amendments
 - Tabulate amendments from issues 1-11
 - Document the intent of amendments based on the rationale that led to the amendment
- Develop a major and minor headings outline
- Insert content in appropriate heading
 - Content of the Hardware Standard that continues to be relevant is not expected to change

Approach – Stakeholder Input

- MSPs will be provided with the catalogue of amendments and the referenced background material for review
 - Feedback that is substantiated from previous background material will be incorporated
- MSPs will be provided with a draft table of contents for review and comment
- MSPs will be provided with a draft Hardware Standard for review and comment

Planned Next Steps

Task	Description	Timeline
1	IESO to gather information in support of past Hardware Standard amendments and catalogue the intent of amendments in the "Amendment Review Document"	March 2018
2	IESO to post the Amendment Review Document to the MSP portal; MSPs to provide comment and IESO to finalize	April 2018
3	IESO to develop a draft table of contents	April 2018
4	IESO to post the draft table of contents to the MSP portal; MSPs to provide comment and IESO to finalize	May 2018
5	IESO to draft redlined updated Hardware Standard	May 2018
6	IESO to post the redlined draft Hardware Standard to the MSP portal; discuss at RMSC/MSP WG meetings; MSPs to provide comment	June 2018
7	IESO to finalize Hardware Standard for Baseline	September 2018