

2015 PROJECT ROADMAP





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Roadmap

ID	Project Name	Project Status	Market Participant Impact	2015				2016				2017					
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
1	Meter Data Management Replacement	In Progress	Technical Interface	█	█												
2	Meter Trouble Report Replacement	In Progress	Functional or Procedural	█	█												
3	Registration Automation	In Progress	Functional or Procedural	█	█	█											
4	Adequacy Reporting Tool Replacement	Planning	Technical Interface	█	█	█											
5	Cybertec Gateway Refresh	Planning	Technical Interface		█	█											
6	EMS Replacement	In Progress	Technical Interface	█	█	█	█										
7	Reporting Technical Refresh	In Progress	Technical Interface	█	█	█	█										
8	NERC Compliance Tool Refresh	Planning	Functional or Procedural		█	█	█										
9	Limiting Ramp-down CMSC for Generators	Planning	Functional or Procedural		█	█	█										
10	NERC CIP V5	Planning	Functional or Procedural		█	█	█	█									
11	Demand Response Pilot	Planning	Functional or Procedural	█	█	█	█	█									
12	Demand Response Auction	Planning	Major Market Change	█	█	█	█	█									
13	Market Information Management System Refresh	In Progress	Technical Interface	█	█	█	█	█									
14	Outage Management System Replacement	In Progress	Technical Interface	█	█	█	█	█									
15	Dispatch Service Refresh	Planning	Technical Interface		█	█	█	█	█								
16	Conservation Management Program	Identified	Major Market Change			█	█	█	█								
17	Report Improvements	Planning	Technical Interface	█	█	█	█	█	█	█	█	█	█	█	█	█	█
18	On-Line Settlement Forms	Planning	Functional or Procedural	█	█	█	█	█	█	█	█	█	█	█	█	█	█

Project Roadmap 2015-Q1.mpp Mon 15/04/13	Identified 	In Progress 
	Complete 	Planning 

Meter Data Management Replacement

- Replace the current Wholesale Meter Data Management application
 - Participants will be able to select desired reports and submit ad-hoc requests through Online IESO
 - Enhance Meter Data Retrieval (up to 24 months will be available online)
 - Meter data reports will be published in EDI format to the new IESO Reports Site

Meter Data Management Replacement

- Participant Impact

- Requires new Revenue Meter Data Contact(s)
 - Revenue Meter Data Contacts can create Meter Data Report Profiles, retrieve metering reports and submit ad-hoc meter data requests
- Meter data reports will be compressed in ZIP format, containing one or more data files in EDI format
- The monthly AQEW AQEI XML report will provide LDCs with DP meter data for use in their monthly embedded generation data submissions
- New API interface access reports
 - Secure File Transfer Protocol (SFTP)

Meter Data Management Replacement

- Timeline
 - Market Trails: April 13, 2015 to May 8, 2015
 - Go Live: June 2015
- Additional Information
 - [SE-113 Settlement Meter Data Management Applications Working Group](#)

Meter Trouble Report Replacement

- Replace the current MTR application with application built on Online IESO platform
 - Enhanced MTR creation logic to avoid issuing duplicate MTRs
 - Added functionality - Meter Outage MTRs
- Participant Impact
 - New Contact Roles
 - New Reports

Meter Trouble Reporting

- Timeline
 - June 2015
- Additional Information
 - [SE-MTR Meter Trouble Reporting](#)

Registration Automation

- Enables Market Participants to register their master data needed to operate market and system
 - Already delivered capability to enrol organization in markets and programs, submit system access request, manage contacts and register revenue meter installations
 - Currently working on enabling registration of facilities and power system equipment via Online IESO

Registration Automation

- Participant Impact
 - New Contact Roles
 - Procedural changes
- Timeline
 - Fall 2015
- Additional Information
 - [SE-108 Online Registration Working Group](#)

Adequacy Reporting Tool Replacement

- Replace the current tool that produces System Status Reports (SSR) and System Adequacy Assessment (SAA) reports
 - Consolidated information between SSR, SAA and Adequacy reports
 - Publish adequacy, transmission limits and system advisories separately
 - System Advisories delivered via RSS feed
 - Hourly publishing of adequacy and transmission system outages for current day

Adequacy Reporting Tool Replacement

- Participant Impact
 - New reports, discontinuing current SSR and SAA reports
- Timeline
 - Fall 2015
- Additional Information
 - [SE-AR Adequacy Reporting](#)

Cybertec Gateway Refresh

- Upgrades gateways that collect real time telemetry information
- Participant Impact
 - Then IESO does not anticipate an impact to participant systems as supported protocols are not changing
 - May request participant support to validate operation of the new gateways
- Timeline
 - All Gateways to be replace in 2015

EMS Replacement

- Upgrades IESO's Energy Management System (EMS)
 - Replacing hardware and upgrading software
 - Scaled to support expansion of the network model
- Participant Impact
 - Support IESO in testing the new telemetry interfaces
- Timeline
 - Q4 of 2015

Reporting Technical Refresh

- Improves Report Site performance and capacity (will also provide new access options)
 - Replaces legacy back-end technologies with industry standard Managed File Transfer solution
 - New programmatic and user interfaces to retrieve reports
 - Supports download of metering reports after Meter Data Management project goes live

Reporting Technical Refresh

- Participant Impact
 - Phase 1: Implement back-end changes
 - Phase 2: New to programmatic and user interfaces
 - Transition period to facilitate the transition to new interfaces

Reporting Technical Refresh

- Timeline
 - Phase 1: mid-April 2015
 - Phase 2: June 2015
 - Transition period: currently planned for six months following the go-live
- Additional Information
 - [SE-RSR Reports Site Refresh Working Group](#)

NERC Compliance Tool Refresh

- Track and manage compliance elements associated to NERC and NPCC standards
 - Replace the current tool
 - Look for improvements in business process
- Participant Impact
 - New Forms to collect data
- Timeline
 - Q4 2015

Limiting Self-Induced CMSC Ramp Down

- Mitigate self induced ramp-down CMSC
 - Provides flexibility for generators to effectively signal their desire to ramp-down; and
 - Provides incentives for generators to operate efficiently
- Participant Impact
 - 2 new charge types
- Timeline
 - Q4 2015
- Additional Information
 - [SE-111 Review of Generation Guarantee Programs](#)

NERC CIP V5

- Program of work to enable compliance to the new NERC Critical Infrastructure Protection standards
- Participant Impact
 - None expected at this time
- Timeline
 - IESO to be compliant by April 2016
 - Work to be substantially complete in 2015

Demand Response Auction

- Provides a cost-effective competitive platform for the selection of Demand Response (DR) to provide capacity availability
 - Will replace the existing practice of multi-year contracting for demand response
- Participant Impact
 - Changes to Online IESO to support registration and participation in the auction
 - New interface to enable offering of capacity into the auction

Demand Response Auction

- Participant Impact (continued)
 - New forms to collect information to support settlement
 - New reports to publish auction results
 - Additional settlement charge types
- Timelines
 - 1st Demand Response Auction planned for Q4-2015
- Additional Information
 - [Demand Response Auction Stakeholder Engagement](#)

Market Information Management System Refresh

- Upgrades the Market Information Management system (MIM)
 - New user interfaces and application programming interfaces (API)
 - Some functional enhancements included based on participant feedback
 - Technology changes
 - No JRE requirement
 - Web Services API
 - Retaining support for IDK to provide participants with up to a year to transition to the new API
 - Hardware replacement and software updates

Market Information Management System Refresh

- Participant Impact
 - Integrating a new User Interface into processes
 - Testing functionality of IDK (API)
 - Upgrading systems to interface with the new web services API
- Timeline
 - Q1 2016: Participant testing, Market Trials
 - Q3 2016: In-service
 - Q3 2017: Decommission IDK
- Additional Information
 - [SE-118 MPI/API Replacement Working Group](#)

Outage Management System Replacement

- Outage Management Replacement
 - Enhancements to the Outage Management process
 - Replaces existing outage management tools
 - New user interface replacing the Online Outage Forms
 - Increase in user functionality
 - New web service API
- Participant impact
 - Participant process changes required to align with outage submission rules
 - API users must upgrade to use the new web services API or use the new user interface

Outage Management System Replacement

- Timeline
 - Q2 2016: Training
 - Q3 2016: Market Trials, in-service
- Additional Information
 - [SE-109 Outage Management Process Redesign](#)

Dispatch Service Refresh

- Replace the Dispatch Service (formerly known as Message Exchange) solution
 - New user interfaces and API
 - Retaining support for the existing API to provide participants with up to a year to transition to the new API
- Participant Impact
 - Integrating new user interfaces into processes
 - Test functionality of existing API
 - Upgrading system to interface with the new web services API

Dispatch Service Refresh

- Timeline
 - Q4 2016
- Additional Information
 - [SE-117 Dispatch Service Working Group](#)

Conservation Management Program

- Implementation of tools to support the Conservation First Framework
 - Automation of tools to support:
 - Submittal of Conservation Demand Management (CDM) plans
 - Settling and invoicing for CDM Execution
 - Monitoring of CDM program performance
 - Enabling Local Distribution Companies (LDCs)
- Participant Impact
 - TBD

Report Improvements

- Create new reports and enhance existing reports
 - Increase availability of data to participants and general public
 - Correct or enhance data that is currently being published
- Participant Impact
 - New and/or Enhanced Reports
- Timeline
 - As needed

On-Line Settlement Forms

- Create new forms and enhance existing forms to support settlement requirements
 - Significant changes will be included as a component of a change initiative
- Participant Impact
 - Provisioning of new information to support settlement requirements
- Timelines
 - As needed

Thank You

Questions?

For any questions or support,
please contact the IESO at

stakeholder.engagement@ieso.ca