

# Release Plan for IT Changes

## Preliminary Plan for Release 46.0, September 2021

Changes to IESO systems planned as part of Release 46.0 are described below. Unless noted otherwise, the planned deployment dates are:

- Sandbox Build on August 5, 2021
- Non-Real Time Build on September 9, 2021
- Real-Time Build on September 15, 2021

For the annual 2021 IESO IT Release Schedule Web page, [click here](#).

There are two changes planned in this release. Each change has a unique ID number.

- A1586 - Implement New Authentication for Market Facing Applications for IESO and Participants and Internal Facing Applications for IESO and Automated External Account Provisioning
- A1587 - Facilitate new delivery agents for the Retrofit 2021-2024 framework

Any modification from a previous release plan is noted in the description. More information about the IT Release Plan is found at the end of this document. Questions or concerns about IESO Release Plans can be sent to the email address, [pending.changes@ieso.ca](mailto:pending.changes@ieso.ca) or directed to IESO Customer Relations.

# ID A1586 - Implement New Authentication for Market Facing Applications for IESO and Participants and Internal Facing Applications for IESO and Automated External Account Provisioning

## **Type of change and implementation date variation**

Real Time, Category 3 release.

## **Stakeholder & Document References**

The following IESO documents will be revised in relation to this change:

- IMO\_GDE\_0004 - Transmission Rights Auction System Participant's Guide
- IMP\_GDE\_0088 - Market Manual 1: Market Entry, Maintenance & Exit Part 1.3: Identity Management Operations Guide
- GDE-258 - ITOPS Guide - Outage Coordination and Scheduling System (OCSS)
- GDE-291 - Web Based Dispatch Service, Market Participant's Guide
- GDE-362 - IT Operations Guide - Capacity Auction (CA) System
- MAN-81 - ITOPS System Overview Manual - Outage Coordination & Scheduling System (OCSS)
- MAN-92 - ITOPS System Overview - Dispatch Service (DS) System
- IMO\_FORM\_1361 - Transmission Rights Auction Information IMO\_GDE\_0004 - Transmission Rights Auction System: Participant's Guide
- MDP\_PRO\_0029 - Market Manual 4: Market Operations Part 4.4: Transmission Rights Auction
- MDP\_PRO\_0027 - Market Manual 4: Market Operations Part 4.2: Submission of Dispatch Data in the Real-Time Energy and Operating Reserve Markets
- SPEC-154 - Dispatch Service Web Service Design Specifications
- SPEC-155 - Dispatch Notification Service Web Service Design Specifications
- IMO\_MAN\_0024 - Participant Technical Reference Manual (PTRM)
- MAN-104 - ITOPS System Overview - Capacity Auction System
- IESO\_OG\_0002 - Transmission Rights Market IESO Operations Guideline
- TRAIN-841- TR Workbook
- GDE-259 - Outage Coordination and Scheduling System (OCSS) CROW Web Client User Guide
- IESO\_SPEC\_0385 - Market Participant Prudential System Solution Specification

## Applications Impacted

Sandbox	Production
Online IESO	Online IESO
Transmission Rights Auction User Interface (TRA)	Transmission Rights Auction User Interface (TRA)
Energy Market Interface User Interface (EMI)	Energy Market Interface User Interface (EMI)
Dispatch Service User Interface	Dispatch Service User Interface
Outage Coordination and Scheduling System (OCSS) User Interface	Outage Coordination and Scheduling System (OCSS) User Interface
Prudential Manager	Prudential Manager
IESO Reports Site	IESO Reports Site
Online IESO Registration Account Provisioning	Online IESO Registration Account Provisioning

### Reason for Change

As part of the EIM portal refresh project, the IESO will migrate from the current OAM Manager and internal Active Directory authentication solution to the Okta cloud-based solution (IESO Gateway). TRA, EMI, Dispatch, CROW, Online IESO, Prudential Manager, Reports Site, CRS GUI and FUS applications will all need to be switched over to IESO Gateway in Sandbox and Production Environments. Manual account provisioning for external users in Online IESO will be updated to automated account provisioning.

### Description of Change

This change will introduce a new more complete way for Market Participants and External Users to register for and sign-on to our market facing applications. The new IESO Gateway will provide enhanced security and additional features that were not available with Oracle Access Manager. These features include but are not limited to:

- Support for Modern Authentication SAML and Open Auth standards,
- Flexible Adaptive Multi-Factor Authentication,
- Full self-service account provisioning and password reset capabilities,
- A single application access dashboard for each environment (sandbox and production) that will serve as single portals for users to access IESO market facing applications and select internal facing applications.

## Expected Impact

The listed applications will experience a small outage associated with this change. Exact Outage timelines will be communicated closer to the implementation dates.

Existing external users will be issued new IESO Gateway accounts (using the same login ID's they currently have) ahead of time and will need to log into the new identity provider in order to activate their accounts and set up their new password, multifactor authentication methods and password recovery options. Instructions on setup will be provided at a later date.

Once migrated, access to these applications should be seamless. The recommendation to end users is to activate their new IESO Gateway accounts with the same passwords they have now with their Active Directory accounts to make the transition easier.

## ID A1587 - Facilitate new delivery agents for the Retrofit 2021-2024 framework

### Type of change and implementation date variation

Non-Real Time, Category 2 release.

### Stakeholder & Document References

No IESO documents will be revised in relation to this change.

### Applications Impacted

Sandbox	Production
Online IESO - Retrofit (RFT)	Online IESO - Retrofit (RFT)

### Reason for Change

The IESO is required to deliver the new 2021-2024 Conservation and Demand Management Framework per the Ministerial directive received September 30, 2020. The Retrofit Portal will need to be updated to facilitate changes to the delivery of the Retrofit program under the new framework. Additionally, the CDM Reported Results module will be updated to improve the IESO's administrative capabilities.

## **Description of Change**

The following changes will be completed in the Retrofit Portal to facilitate changes to the delivery of the program:

1. The Retrofit program delivery zone structure will be changed from 4 zones to 5 zones
2. New Retrofit program delivery agents will be assigned to the new 5 zone structure
3. Peak demand savings will be calculated for new applications within the Retrofit Portal and retroactively calculated for existing Interim Framework and 2021-2024 Framework applications
4. Retrofit program delivery agents will have a new "Save Changes" functionality while reviewing applications

Furthermore, the CDM Reported Results module will be updated to provide the IESO administrative capabilities with respect to managing programs, the IESO's Conservation and Demand Management Plan, and vendors.

## **Expected Impact**

Once the new Retrofit program delivery agents are assigned to the new 5 zone structure, the existing Retrofit program delivery agents will not receive any new Retrofit applications in the Retrofit Portal. However, the existing Retrofit program delivery agents will continue to be able to manage their existing applications in the Retrofit Portal. Additionally, users of the Retrofit Portal will see new "Peak Demand Savings" values calculated for their new and existing Retrofit applications. The Retrofit program delivery agents will have additional functionality while reviewing and approving applications to facilitate improved quality assurance. Lastly, the IESO will have improved oversight over invoice approval timelines and new administrative capabilities within the CDM Reported Results module.

All internal and external users of Retrofit and CDM Reported Results applications hosted on the Online IESO platform should not log into the system during the implementation.

## About the IT Release Plan

Four times a year, the IESO coordinates a release package of changes to IESO systems that will impact users outside the IESO. These changes are categorized as either:

- **Category 2** change (users will have to make a functional change, such as an update to a procedure), or
- **Category 3** change (users will have to modify a technical interface with an IESO system or solution).

For each release, three versions of the Release Plan are published:

1. Preliminary Release Plan
2. Target Release Plan
3. Final Release Plan

The IT Release Schedule provides the planned dates for each release. Dates for specific changes may differ from the calendar dates, but these will be provided in the Release Plan. For the full 2021 Release Schedule on the IESO Web page , [click here](#).

Sandbox Implementation is the date the change is deployed on the IESO Sandbox environment, used for testing and training.

Production Build is the date the change goes live. This may happen during either:

1. Real-Time Build for systems used to interact with the IESO-Controlled Grid or IESO-Administered Market, or
2. Non-Real Time Build for other systems used to interact with the IESO, such as those used for settlements or registration activities.

Efforts are made to minimize the impacts of system outages during planned releases. Planned outages are posted in advance on the IESO Planned IT Outages Web page. [Click here for a link](#).