

Release Plan for IT Changes

Preliminary Plan for Release 47.0, March 2022

Changes to IESO systems planned as part of Release 47.0 are described below. Unless noted otherwise, the planned deployment dates are:

- Sandbox Build on January 20, 2022
- Non-Real Time Build on February 23, 2022
- Real-Time Build on March 2, 2022

For the annual 2022 IESO IT Release Schedule Web page, [click here](#).

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

- ID 100311 - Complete the Implementation of Okta Authentication for Market Facing Applications – Energy Market Interface (EMI) and eMIM Web Service, Dispatch Service Web Service, Outage Coordination and Scheduling System (OCSS) Web Service and the Confidential Reports Site for IESO and Participants
- ID 100317 - Enhanced Prescriptive Measure Capability and Usability Improvements for Retrofit Portal

Any modifications in future versions of this release plan will be 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, pending.changes@ieso.ca or directed to IESO Customer Relations.

ID 100311 - Complete the Implementation of Okta Authentication for Market Facing Applications – Energy Market Interface (EMI) and eMIM Web Service, Dispatch Service Web Service, Outage Coordination and Scheduling System (OCSS) Web Service and the Confidential Reports Site for IESO and Participants.

Type of change

Real Time, Category 3.

Stakeholder & Document References

- None

Applications Impacted

Sandbox	Production
Energy Market Interface (EMI)	Energy Market Interface (EMI)
eMIM Web Service	eMIM Web Service
Dispatch Service Web Service	Dispatch Service Web Service
Outage Coordination and Scheduling System (OCSS) Web Service	Outage Coordination and Scheduling System (OCSS) Web Service
IESO Sandbox Participant Reports Click http://reports-sandbox.ieso.ca/ to go to this Web page on ieso.ca	IESO Participant Reports Click http://reports.ieso.ca/ to go to this Web page on ieso.ca
IESO Sandbox Portal The IESO Sandbox Portal will be discontinued shortly after the release	IESO Portal The IESO Portal will be discontinued shortly after the release

Reason for Change

As part of the External Identity Management (EIM) portal refresh project, the IESO will complete the migration to the Okta cloud-based solution (IESO Gateway) from the current Oracle Access Manager and internal Microsoft Active Directory authentication solution. This continues work that was begun in Release 46.0 in September 2021.

The Energy Market Interface (EMI) GUI and the eMIM web service, Dispatch Service web service, OCSS web service, the Confidential Participant Reports Site and its associated Web API for SFTP downloads, remain to be switched over to IESO Gateway in Sandbox and Production Environments and this will be done during this release.

Description of Change

This change will complete the IESO Gateway solution for Market Participant external users to register for accounts and sign-on with those accounts to the IESO market facing applications. The IESO Gateway provides enhanced security and additional features that are not available with Oracle Access Manager. These features include:

- Support for Modern Authentication SAML and Open Auth standards.
- Flexible Adaptive Multi-Factor Authentication Options for external end users using a browser.

- Full participant registration and automated self-service user account provisioning and password reset capabilities.
- A single application access user dashboard for each environment (sandbox and production) already in use since Release 46.0 in September 2021 will now include the Energy Market Interface (EMI) browser GUI in addition to the other IESO market facing applications and use Okta account authentication for the EMI.
- The Confidential Reports Site browser GUI will also be switched over to Okta authentication for external users while the Confidential Reports Site web API will continue to authenticate API accounts against the internal IESO Active Directory system although API accounts will be automatically replicated from Okta to the IESO Active Directory and kept synchronized for ease of provisioning and use.
- The eMIM Web Service API, Dispatch Service Web Service API and OCSS Web Service API will continue to use secure LDAP authentication but it will be with IESO Gateway accounts (Okta) now and will utilize account credential security session caching to minimize the actual logins per unit of time. Account credential caching is projected to be 1 to 2 hours before expiry. Re-login will be automatic. This should improve performance of these services.

Expected Impact

The listed applications will experience a short outage during implementation of this change. Exact outage timelines will be communicated closer to the implementation dates.

Energy Market Interface (EMI)

- As a result of this change, IESO Gateway will include the Energy Market Interface (EMI).
- Existing external users will be able to use their existing IESO Gateway accounts to access the Energy Market Interface via the IESO Gateway (using the same login IDs they currently use for Gateway). An Energy Market Interface tile will be displayed in the Gateway Dashboard.

Confidential Reports Site

- The same Gateway accounts will be used to access the Confidential Participants Reports site browser GUI URL directly, where registered for access.
- For the Confidential Reports Site Web API, the API account custodians will continue the use of existing API accounts. However, if currently using a normal, non-API account with the Web API for scraping, the Market Participant may need to register for new API accounts, if none exists, or switch to an existing API account, if it exists.
- Some password updates in code on clients may be needed due to the added API account replication from Okta to IESO Active Directory, if the custodians have not made the matching Okta and existing Active Directory account passwords the same. API account replication from Okta to the IESO Active Directory will include the password that is set on the Okta account.

eMIM Web Service API, Dispatch Service Web Service API and OCSS Web Service API

- The IESO will attempt to ensure only API accounts are used directly with Dispatch Service, OCSS and eMIM web services via configuration of RBAC (role-based access control) with the Okta API group membership where possible. If not, the IESO will communicate the need to only use API accounts with the web services.
- API account custodians continue use of their API accounts as they do now for all web services. However, if currently using a normal non-API account with any web service, the Market Participant may need to register for new API accounts, if none exists, or switch to an existing API account, if it exists. Some password updates in code on clients may be needed due to API account replication from Okta to IESO Active Directory, if the custodians have not made the matching UserID Okta and existing Active Directory account passwords the same.

IESO Portal

- The IESO Portal, including Sandbox Portal, will be discontinued shortly after the release.

ID 100317 - Enhanced Prescriptive Measure Capability and Usability Improvements for Retrofit Portal

Type of change

Non-Real Time, Category 3.

Stakeholder & Document References

The Retrofit Service Provider API - SPEC-232 will be updated to reflect changes made to the Retrofit portal. See the Retrofit section of the Technical Interfaces Web page: <https://www.ieso.ca/en/Sector-Participants/Technical-Interfaces>

Updates will be made to the Retrofit portal guide for applicant and applicant reps. ([Click here to download the current version.](#))

Applications Impacted

Sandbox

Sandbox Online IESO

Click <https://onlinesandbox.ieso.ca>

The following Online IESO applications will be impacted:

RFT – Retrofit

RSPA – Retrofit SP API

RFT – Retrofit Maintenance

Retrofit to Reported Results API

Production

Online IESO

Click <https://online.ieso.ca>

The following Online IESO applications will be impacted:

RFT – Retrofit

RSPA – Retrofit SP API

RFT – Retrofit Maintenance

Retrofit to Reported Results API

Reason for Change

The IESO is currently delivering the Retrofit program as part of the 2021-2024 Conservation and Demand Management Framework. ([Click here for the Retrofit program Web site.](#)) The Retrofit portal is being updated to facilitate additional energy efficiency measures to be made available to participants under the program. Furthermore, in order to improve customer satisfaction, the IESO is making changes to the Retrofit portal to enhance its usability.

Description of Change

There are two changes to the Retrofit portal as follows:

1. Applicants and Applicant Representatives will be able to provide more detailed information about certain energy efficiency measures when applying for incentives.
2. Applicants and Applicant Representatives will see aesthetic changes to the portal, that include changes to the colour scheme, layout, formatting, and organization of certain pages, which will facilitate a greater ease of use and enhance the portal experience.

Expected Impact

There is no outage to Online IESO during implementation, however participants will not be able to use the application during the implementation time window.

Applicants and Applicant representatives are encouraged to attend information sessions regularly provided by the Retrofit program delivery team with respect to any changes to the suite of energy efficiency measures offered by the program.

The aesthetic changes being made to the Retrofit portal will have no functional impact on Applicants and Applicant Representatives but will enhance their portal experience and usability.

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 2022 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.](#)