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# Metering Role Changes

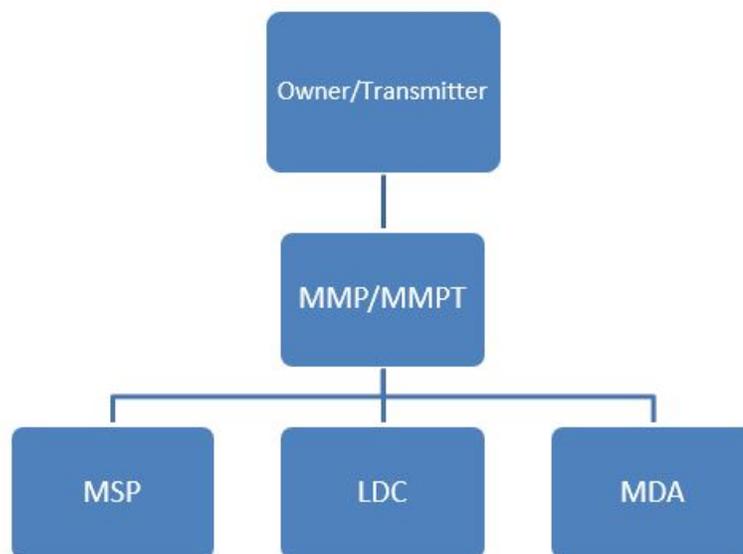
March 2019

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# Introduction

The purpose of this documentation is to provide guidance for online IESO external users to manage resource business roles during the Metering Forms Automation Project market trial. The Online IESO process workflows were established in conjunction with the market rules. The assignment tasks are initiated by the Owner/Transmitter of a resource and a new MMP/MMPT is selected (see diagram below). The new MMP/MMPT will receive a task to review the role assignment for the resource. If accepted, the MMP/MMPT will be prompted to assign an MSP, LDC (MMP only) and MDA. The new MSP will receive a task to review the role assignment. If accepted, the IESO will review all changes before finalizing the change. In this user guide, all organization names will be replaced by the dummy organization 'Globex Corp' for confidentiality.



In addition, the following business rules will be applied:

1. If the effective date has already passed, the system will choose the next available day by default.
2. All business role requests should be made before 10 business days from the effective day.
3. If a future owner assigns a role before 10 days ahead, all related parties can respond even if within 10 days.
4. During the meter deregistration workflow, if either the owner or transmitter rejects the task, the process will be terminated.
5. Email notifications will be sent to all involved parties with regards to update status and change.
6. LDC and MDA role changes will take effect in the next business day.

# 1.0 Energy Market

## 1.1 Owner updates MMP

1. Login with an owner username
2. Go to "Actions" tab on the top
3. Go to "Manage Resources"
4. Select "Modify Resource Business Roles"

### Manage Resources

**Action**  
Modify Resource Business Roles

Add or modify business roles for existing resources where your organization is the Owner or Metered Market Participant (MMP)

**Owner/MMP Organization \***  
--- Select an Organization ---

Select the organization that is the Owner or the MMP for the resource(s) you intend to manage

[BACK](#) [NEXT](#)

5. Select the owner organization you are representing, click "Next"

News Tasks (158) Records Reports **Actions**

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### Modify Resource Business Roles

This process will allow you to establish or transfer business roles for resources where your organization is either the Owner or Metered Market Participant (MMP).

Organization	Request Number
GLOBEX CORP. (30)	3788

**Select Organizational Business Role(s) you intend to modify \***

- Registered Market Participant (RMP)
- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)
- Meter Service Provider (MSP)
- Meter Data Associate (MDA)
- Local Distribution Company (LDC)

**Select Organizational Business Role(s) you intend to establish for an acquired facility**

- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)

[CANCEL](#) [NEXT](#)

6. Pick MMP, the business role you would like to modify
7. Click "Next"
8. Select organization, effective date

9. Select resource, and click "submit"

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### Modify Resource Business Roles - Select Resources

**Request Details**

Organization: Globex Corp      Request Number: 3492  
Request Type: Modify Resource Business Roles (MMP)

Select the organization you intent to use as the new MMP. \*

When do you want this change to be effective? \*

11/07/2018  
A min of 14 bussiness days is required to process an MMP update request

**Resource Selection \***  
Please select the resources for which you want to transfer the business role to a new organization.

<input checked="" type="checkbox"/>	Resource ID	Resource Name	↑ Resource Type	Facility Name	Current MMP Organization
<input checked="" type="checkbox"/>					

Select all resources  
Unselect all resources

**Selected Resource(s)**  
Click on (+) to expand the list.  
• (+) ATTAWAPISKAT CTS (1)

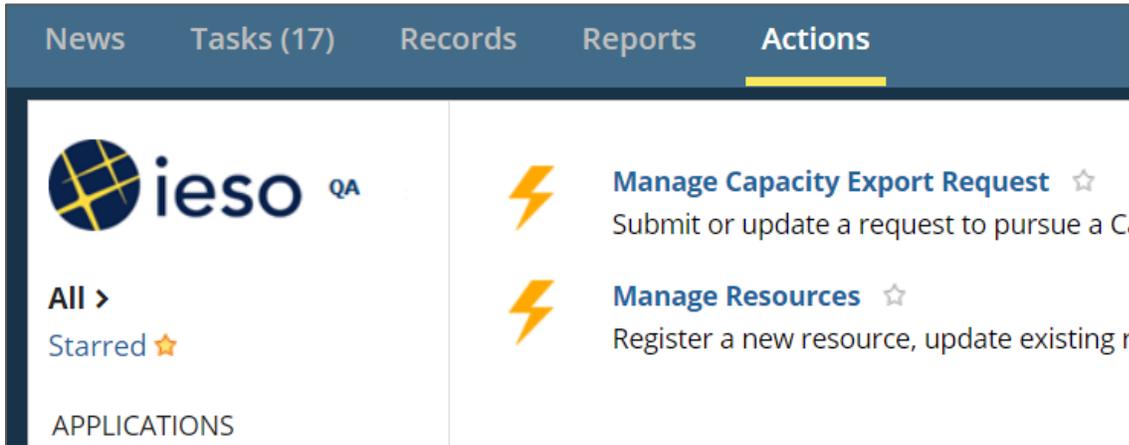
CANCEL    BACK      **SUBMIT**

10. Review the change

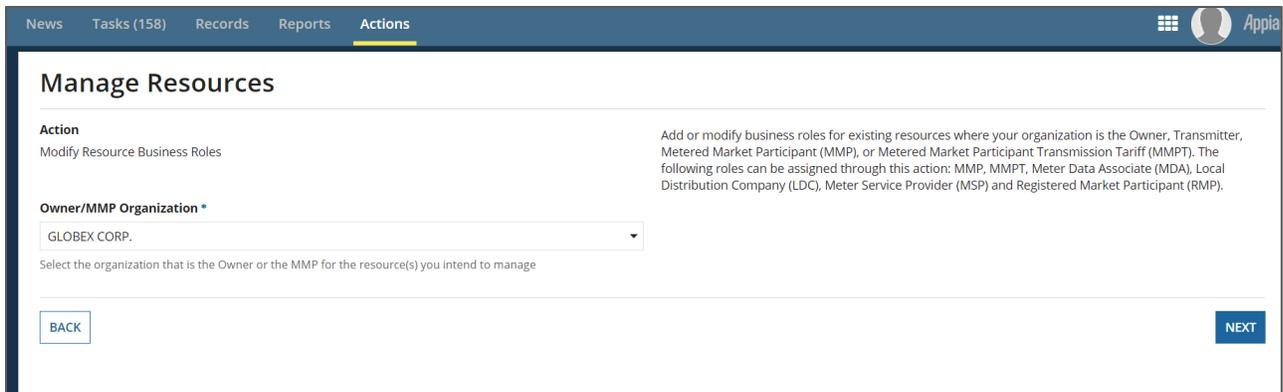
11. For MMP reviewing the assignment task, [please refer to section 4.0.](#)

## 1.2 MMP updates LDC

1. Login as a MMP
2. Go to "Actions" tab



3. Go into "Manage Resources"
4. Go into "Modify Resource Business Roles"
5. Choose the MMP organization you are representing



6. Select "Local Distribution Company" (LDC) as the business role you intend to modify, and click "Next"
7. Select the desired LDC for your resources

## Modify Resource LDC Business Roles

### Request Details

Organization Globex Corp

Request Number 3700

Request Type Modify Resource Business Roles (LDC)

CANCEL BACK

SUBMIT

### Resource LDC Assignment

Please confirm your DP LDC assignments and update as necessary.

Resource ID	Resource Name	Resource Type	Facility Name	LDC Organization

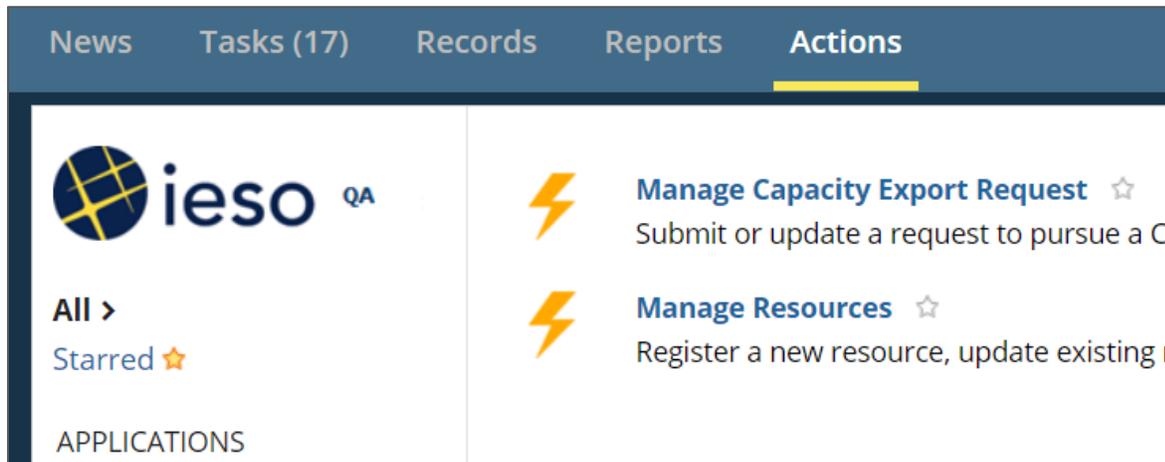
CANCEL BACK

SUBMIT

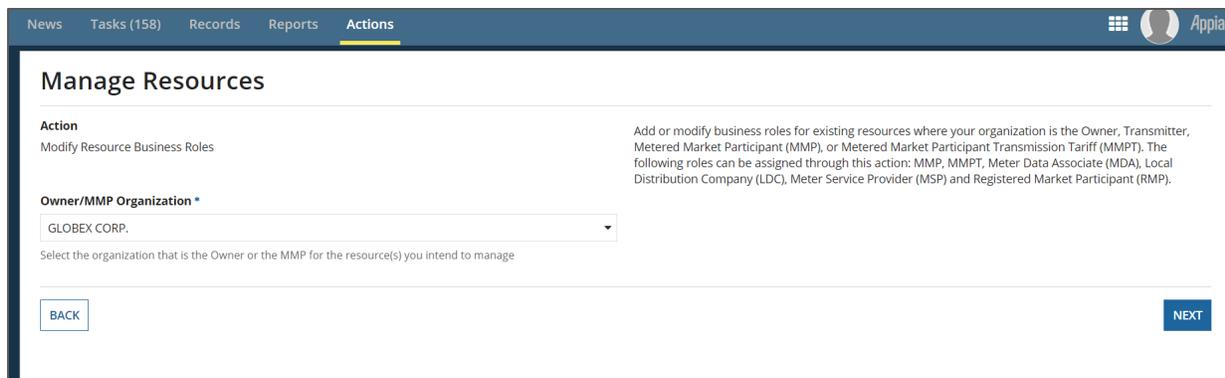
8. Submit and confirm your modifications.

## 1.3 MMP updates MDA

1. Login as MMP
2. Go to "Actions" tab



3. Go into "Manage Resources"
4. Go into "Modify Resource Business Roles"
5. Choose the MMP organization you are representing



6. Select "Meter Data Associate" (MDA) as the business role you intend to modify, and click "Next"
7. Choose the new MDA for your resources, click "Submit" once done
8. Confirm your changes.

## Modify Resource MDA Business Roles

### Request Details

Organization Globex Corp

Request Number 3701

Request Type Modify Resource Business Roles (MDA)

CANCEL BACK

--Select Organization--

BATCH UPDATE

REVERT

SUBMIT

Batch update all your DPs with the selected organization

### Resource MDA Assignment

Please confirm your DP MDA assignments and update as necessary.

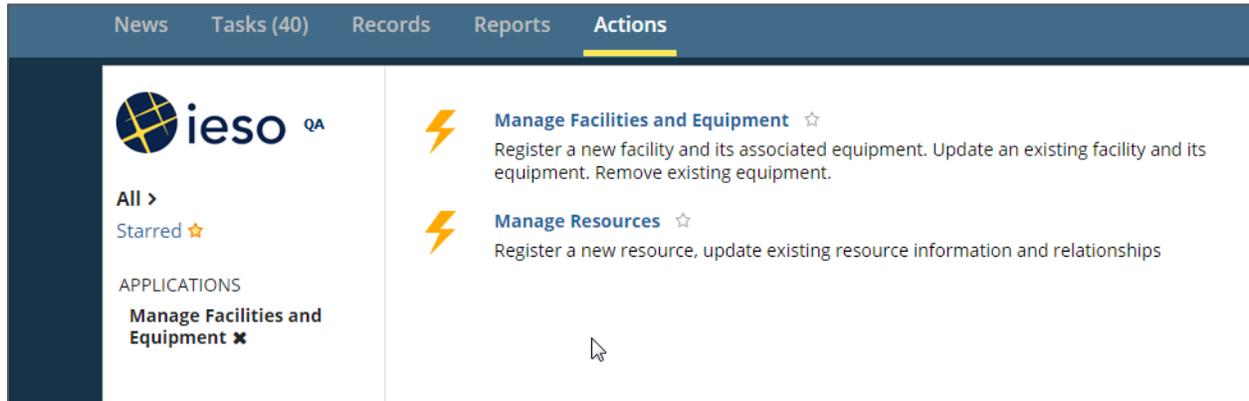
Resource ID	Resource Name	Resource Type	Facility Name	MDA Organization
				▼
				▼
				▼

CANCEL BACK

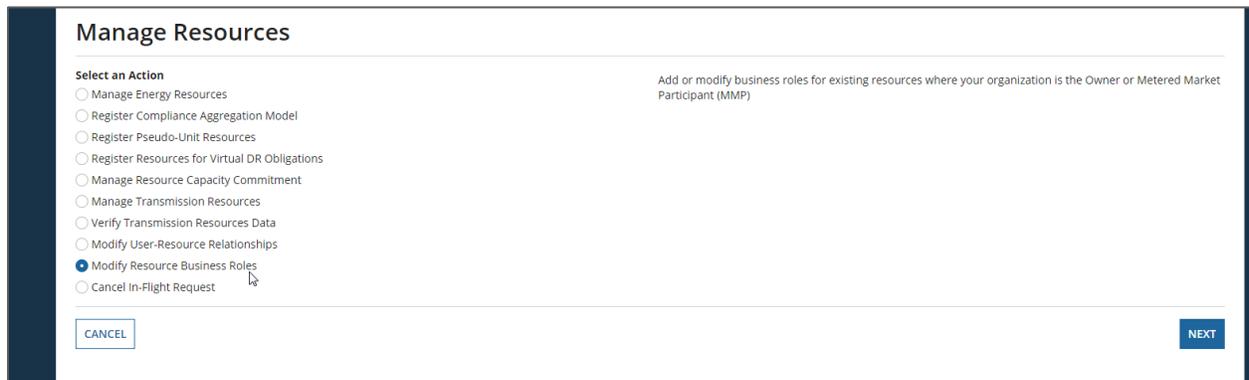
SUBMIT

## 1.4 MMP updates MSP

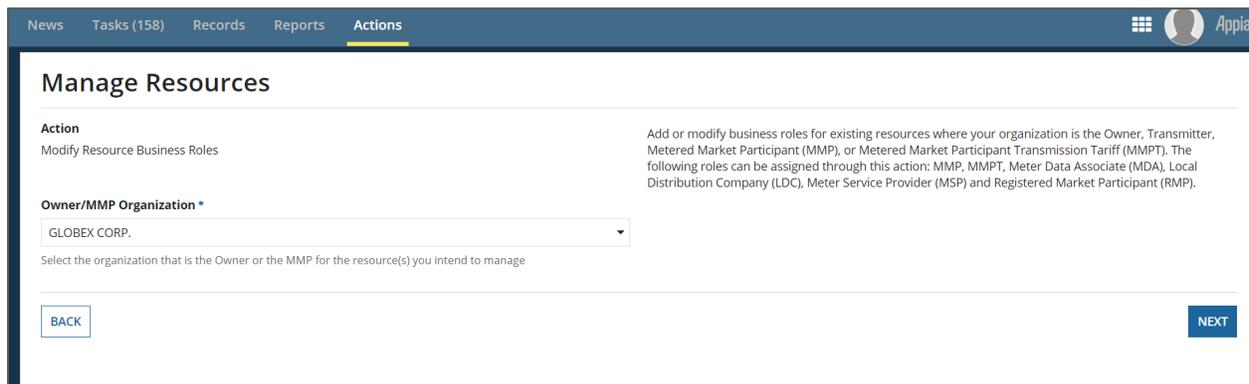
1. Login as MMP
2. Go to "Actions" tab on the top



3. Select "Manage Resources", then wait for the page to respond



4. Select "Modify Resource Business Roles", wait for response, click "next"
5. Choose the organization you are representing in the dropdown, click "next"



6. Select "MSP" which is the role you want to update, next
7. Choose the new MSP organization, select appropriate resources, click "submit"

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### Modify Resource Business Roles - Select Resources

**Request Details**

Organization: Globex Corp      Request Number: 3486  
Request Type: Modify Resource Business Roles (MSP)

Select the organization you intent to use as the new MSP. \*

When do you want this change to be effective? \*

10/03/2018

A min of 10 bussiness days is required to process an MSP update request.  
Effective Date can't be before 10/04/2018

**Resource Selection \***

Please select the resources for which you want to transfer the business role to a new organization.

<input type="checkbox"/>	Id	Name	Type	Current MSP Organization
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

**Selected Resource(s)**

Click on (+) to expand the list.

- (+) AGINCOURT TS (1)

8. Review information, confirm.
9. The MSP will receive notification and review the task. [Please refer to section 4.0 for how to review role assignments.](#)

## 1.5 MMP/MSP End Dating

1. Login as a MMP/MSP
2. Go to "Actions" tab

**Create a Meter Trouble Report** ☆  
Step-by-step wizard for the creation and submission of a Meter Trouble Report.

**Manage Meter Data Report Profile** ☆  
Create or edit meter data report profile for your organization

**Manage Meter Installation** ☆  
Register new connections, update existing meter installations and deregister meter installations.

**Request Meter Data Report** ☆  
Request ad-hoc revenue meter data report for your organization

3. Select "Manage Meter Installation"
4. Select "Deregister Meter Installation(s)", then choose your organization.

News Tasks (56) Records Reports **Actions**

### Manage Meter Installations

Register new connections, update and upgrade existing meter installations and deregister meter installations.

Select an Action *	Description
<input type="radio"/> Register Meter Installation(s)	
<input type="radio"/> Update Meter Installation(s)	
<input type="radio"/> Like for Like/Master File Update	
<input checked="" type="radio"/> Deregister Meter Installation(s)	Select this option to deregister meter installations at a facility
<input type="radio"/> Modify Meter In-Service Date	
<input type="radio"/> Verify Meter Installation Master Data	

5. Choose the facility in which you want to deregister the meter(s).

News Tasks (56) Records Reports **Actions**

## Manage Meter Installations

Register new connections, update and upgrade existing meter installations and deregister meter installations.

**Request Type**  
Deregister Meter Installation(s)

**Organization**  
Globex Corp (MSP) [REDACTED]

**Facility \***  
[REDACTED]

[BACK](#)

6. Choose the meter installation(s) that need to be deregistered, then "next"

[SAVE DRAFT](#)

### Select Meter Installation(s)

Select the meter installation(s) you would like to deregister

**Request Details**

<b>Request Type</b> Deregister Meter Installation(s)	<b>Request Number</b> 18254
<b>Organization</b> Globex Corp	<b>Scope of Work</b>
<b>Facility</b> [REDACTED]	

**Select Meter Installation(s)**

\*  
Please select the meter installation(s) you would like to deregister. Only meter installations on the same Single Line Diagram can be deregistered at the same time. Once the first meter installation has been selected the list will be filtered to include only meter installations on the same Single Line Diagram.

<input type="checkbox"/>	Meter Installation Name	Meter Installation ID	Single Line Diagram ID
<input type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]

[BACK](#) [NEXT](#)

7. Upload Single Line Diagram, comment if needed. Then click "submit"

News Tasks (56) Records Reports **Actions** 

## Upload Single Line Diagram

Provide an updated Single Line Diagram

---

**Request Details**

<b>Request Type</b> Deregister Meter Installation(s)	<b>Request Number</b> 18254
<b>Organization</b> Globex Corp	<b>Scope of Work</b>
<b>Facility</b> Globex GS	
<b>Proposed Effective Date</b> 5/22/2019	

**Meter Installations to Deregister**

Meter Installation Name	Meter Installation ID
[REDACTED]	[REDACTED]

**Updated Single Line Diagram**

<b>SLD File *</b>  [REDACTED]	<b>Proposed Effective Date *</b> 05/22/2019
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**Comments**

**Submission Comments \***

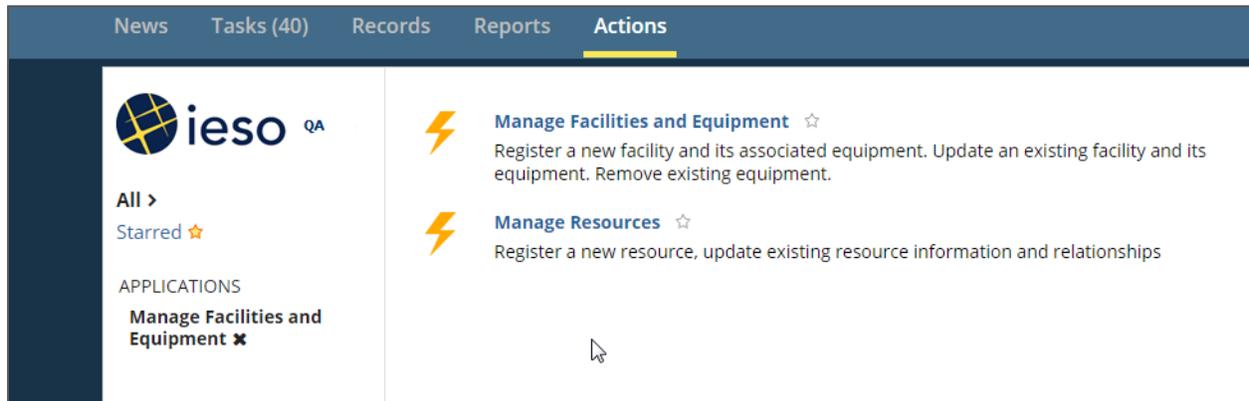
end dating test

8. Confirm your change.
9. After IESO approves, the owner/transmitter will get a task to review the deregistration.

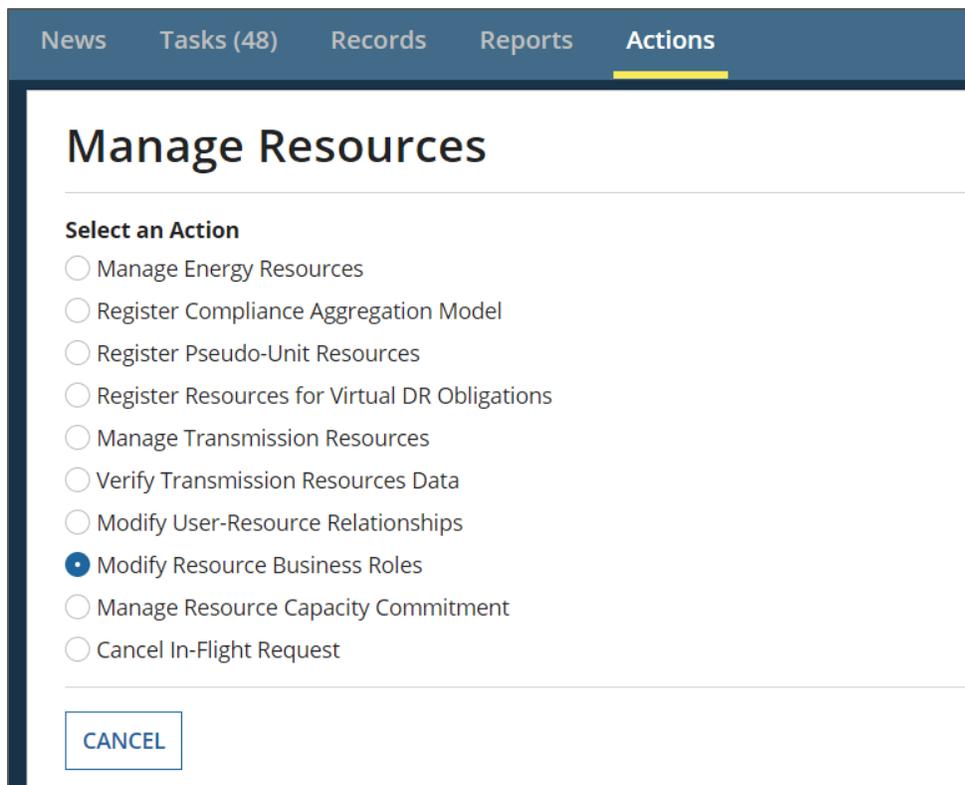
## 2.0 Transmission Market

### 2.1 Transmitter updates MMPT

1. Log in as a Transmitter
2. Go to "actions" tab



3. Choose "Manage Resources", then click on "Modify Resource Business Roles", click "Next"



4. Select the transmitter organization you are representing

News Tasks (48) Records Reports **Actions**

## Manage Resources

**Action**  
Modify Resource Business Roles Add o  
Meter

**Owner/MMP Organization \***  
Globex Corp

Select the organization that is the Owner or the MMP for the resource(s) you intend to manage

BACK

5. Select Metered Market Participant Transmission Tariff (MMPT), the business role you'd like to modify.

## Modify Resource Business Roles

This process will allow you to establish or transfer business roles for resources where your organizati

**Organization**  
Globex Corp

**Select Organizational Business Role(s) you intend to Modify \***

- Registered Market Participant (RMP)
- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)
- Meter Service Provider (MSP)
- Meter Data Associate (MDA)
- Local Distribution Company (LDC)

**Or select Organizational Business Role(s) you intend to Modify as future dated Owner.**

- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)

6. Choose the organization you want to assign as the new MMPT

Select the organization you intend to use as the new MMPT. \*

Globex Corp

When do you want this change to be effective? \*

03/18/2019

A min of 10 business days is required to process an MMPT update request

Display Resources that belong to

--All Facilities--

**Resource Selection \***

Please select the resources for which you want to transfer the business role to a new organization.

<input type="checkbox"/>	Resource ID	Resource Name	↑ Resource Type	Facility Name	Current MMPT Organization
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input checked="" type="checkbox"/>					

**Selected Resource(s)**

Click on (+) to expand the list.

- (+) CNP STEVENSVILLE CTS (1)

7. Choose the date that you want the modification to take place.

8. Pick the DP that you intend to assign to the new MMPT, click "Submit"

9. Verify the confirmation page, click "confirm" if all information is correct

## 2.2 MMPT updates MDA

1. Log in as Transmitter, go to "Actions" tab
2. In "Manage Resources", select "Modify Resource Business Roles"
3. Choose the MMPT organization you are representing, click "Next"

### Modify Resource Business Roles

This process will allow you to establish or transfer business roles for resources where your organization is either the O

**Organization**  
Globex Corp

**Select Organizational Business Role(s) you intend to Modify \***

Registered Market Participant (RMP)

Metered Market Participant (MMP)

Metered Market Participant Transmission Tariff (MMPT)

Meter Service Provider (MSP)

Meter Data Associate (MDA)

Local Distribution Company (LDC)

**Or select Organizational Business Role(s) you intend to Modify as future dated Owner.**

Metered Market Participant (MMP)

Metered Market Participant Transmission Tariff (MMPT)

4. Choose "Meter Data Associate" (MDA), click "Next"
5. Manage your resources MDA assignment, or you can perform a Batch update

### Modify Resource MDA Business Roles

**Request Details**

Organization: Globex Corp      Request Number: 3696

Request Type: Modify Resource Business Roles (MDA)

     --Filter By Facility--      --Select Organization--     

Batch update all your DPs with the selected organization

**Resource MDA Assignment**

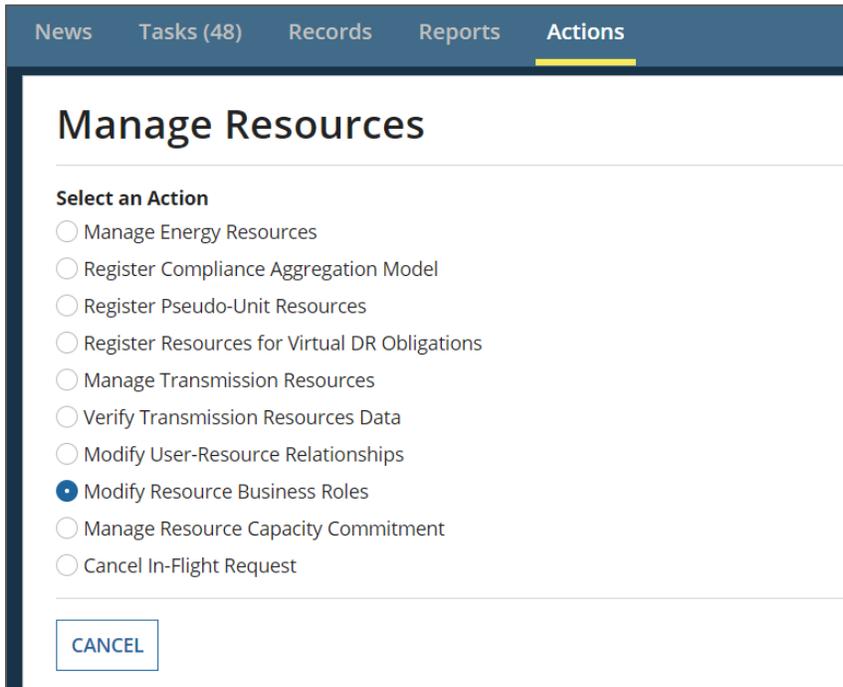
Please confirm your DP MDA assignments and update as necessary.

Resource ID	Resource Name	Resource Type	Facility Name	MDA Organization
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--
				--NO MDA ASSIGNED--

6. Confirm your modification.

## 2.3 MMPT updates MSP

1. Login with an MMPT username
2. Go to "Actions" tab on the top
3. Go to "Manage Resources"
4. Select "Modify Resource Business Roles"



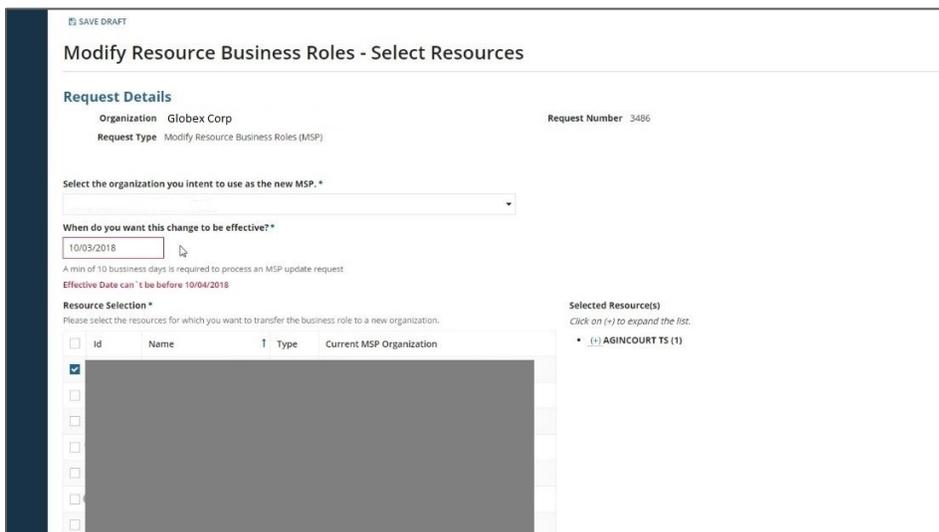
News Tasks (48) Records Reports **Actions**

### Manage Resources

**Select an Action**

- Manage Energy Resources
- Register Compliance Aggregation Model
- Register Pseudo-Unit Resources
- Register Resources for Virtual DR Obligations
- Manage Transmission Resources
- Verify Transmission Resources Data
- Modify User-Resource Relationships
- Modify Resource Business Roles**
- Manage Resource Capacity Commitment
- Cancel In-Flight Request

5. Select your MMPT organization, click "Next"
6. Pick the MSP you intend to assign



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### Modify Resource Business Roles - Select Resources

**Request Details**

Organization: Globex Corp Request Number: 3486  
Request Type: Modify Resource Business Roles (MSP)

Select the organization you intent to use as the new MSP. \*

When do you want this change to be effective? \*

10/03/2018

A min of 10 business days is required to process an MSP update request.  
Effective Date can't be before 10/04/2018

**Resource Selection \***

Please select the resources for which you want to transfer the business role to a new organization.

<input type="checkbox"/>	Id	Name	Type	Current MSP Organization
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

**Selected Resource(s)**

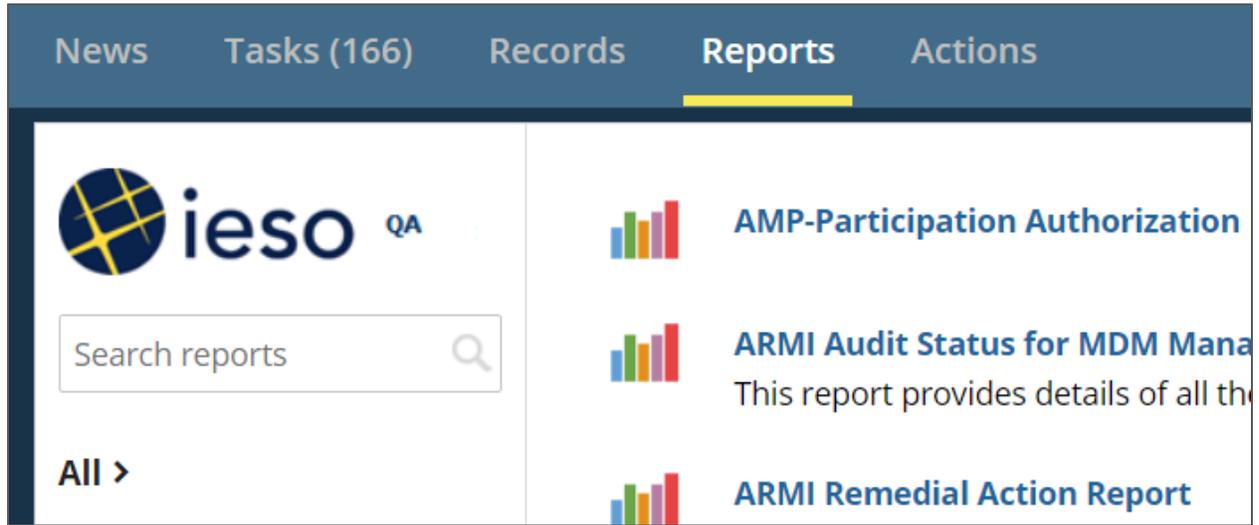
Click on (+) to expand the list.

- (+) AGINCOURT TS (1)

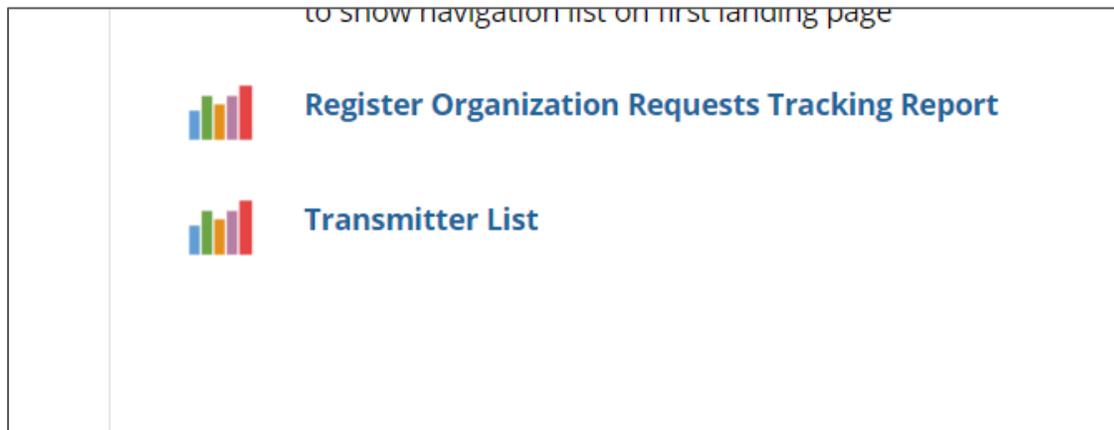
7. Select appropriate resource to assign to the new MSP
8. Click "Next"
9. Confirm the change. [The assignee please refer to section 4.0](#)

## 2.4 Verify Transmitter List

1. After login, go to "Reports" tab



2. Scroll down and go to "Transmission List"



3. Review the list, and click on "Export Transmission List to Excel"

# Transmitter List

Export Transmission List to Excel

*Substation filter*

**FILTER**

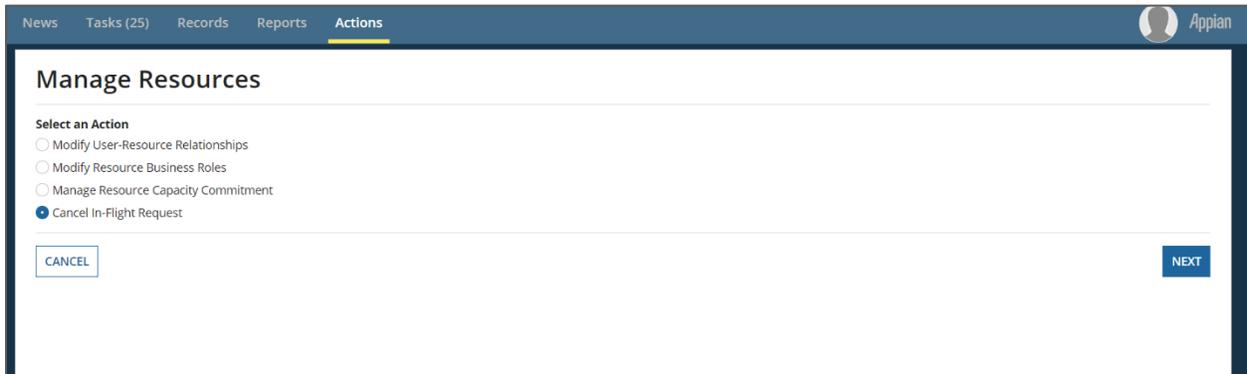
4. Download and save the file. The Transmitter List will be in the excel file.

Please feel free to contact IESO metering installations if there are any issues.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Transmission Customer No	Substation No	Line Connection	Transformation Connection	Network	Network DP No	Network DP Effective D	Connection	Connection DP No	Connection DP Effective E	MSP	MSP Effective D
2												
3												
4												
5												
6												
7												
8												
9												
10												
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32												

## 3.0 Cancelling a Request

1. Login with the account which the request was sent on (only the request creator can cancel)
2. Go to "Actions" tab on the top
3. Go to "Manage Resources"
4. Select "Cancel In-Flight request", then click "Next"



The screenshot shows the 'Manage Resources' page in the 'Actions' tab. The 'Cancel In-Flight Request' option is selected, and the 'NEXT' button is visible.

News Tasks (25) Records Reports **Actions** Appian

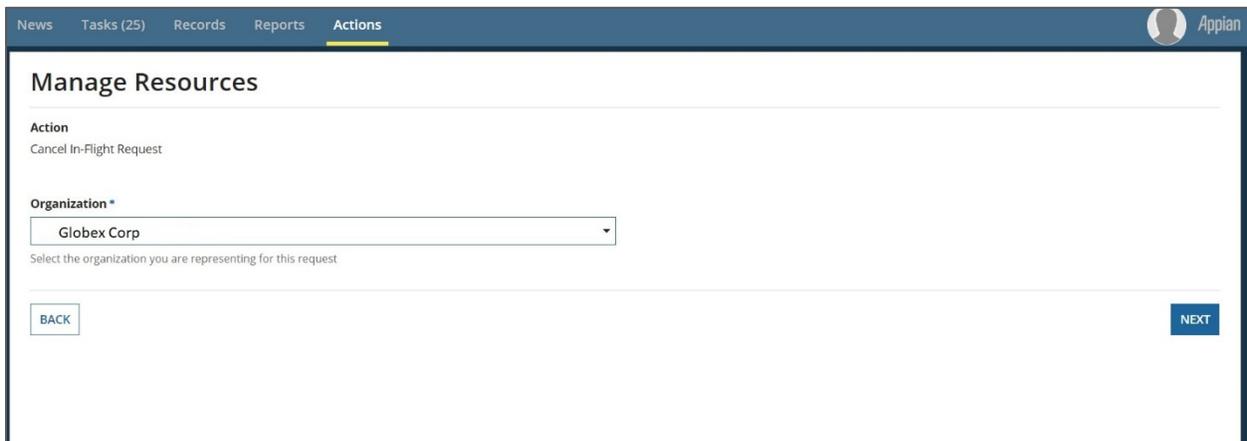
### Manage Resources

Select an Action

- Modify User-Resource Relationships
- Modify Resource Business Roles
- Manage Resource Capacity Commitment
- Cancel In-Flight Request

CANCEL NEXT

5. Select the organization which issued the request, click "Next"



The screenshot shows the 'Manage Resources' page in the 'Actions' tab. The 'Organization' dropdown is set to 'Globex Corp', and the 'NEXT' button is visible.

News Tasks (25) Records Reports **Actions** Appian

### Manage Resources

Action  
Cancel In-Flight Request

Organization \*

Globex Corp

Select the organization you are representing for this request

BACK NEXT

6. Select the request(s) that needs to be cancelled

News Tasks (25) Records Reports **Actions** 

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### Select Request to Cancel for Globex Corp

<input type="checkbox"/>	Request Number	Request Type	Facility	Start Time	Initiator User
<input type="checkbox"/>	3680	Modify Resource Business Roles		2/26/2019 9:31 AM EST	owners
<input type="checkbox"/>	3675	Add or Remove equipment to an existing facility		2/25/2019 3:01 PM EST	dmytrowd
<input type="checkbox"/>	3673	Add or Remove equipment to an existing facility		2/25/2019 1:17 PM EST	dmytrowd
<input type="checkbox"/>	3672	Add or Remove equipment to an existing facility		2/25/2019 11:34 AM EST	dmytrowd
<input type="checkbox"/>	3670	Add or Remove equipment to an existing facility		2/25/2019 10:57 AM EST	dmytrowd
<input type="checkbox"/>	3666	Register Facility		2/22/2019 1:21 PM EST	dmytrowd
<input type="checkbox"/>	3665	Add or Remove equipment to an existing facility		2/22/2019 9:30 AM EST	dmytrowd
<input type="checkbox"/>	3664	Add or Remove equipment to an existing facility		2/22/2019 9:27 AM EST	dmytrowd
<input type="checkbox"/>	3661	Add or Remove equipment to an existing facility		2/21/2019 11:42 AM EST	dmytrowd
<input type="checkbox"/>	3660	Add or Remove equipment to an existing facility		2/21/2019 10:33 AM EST	dmytrowd

< 1 - 10 of 64 >

\* Cancellation Reason: request cancelled for testing.....etc....

7. Review your change. Verify your organization ID, Name and request start date. Confirm the change

News Tasks (26) Records Reports **Actions** 

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### Confirm Cancellation

#### Registration Request Details

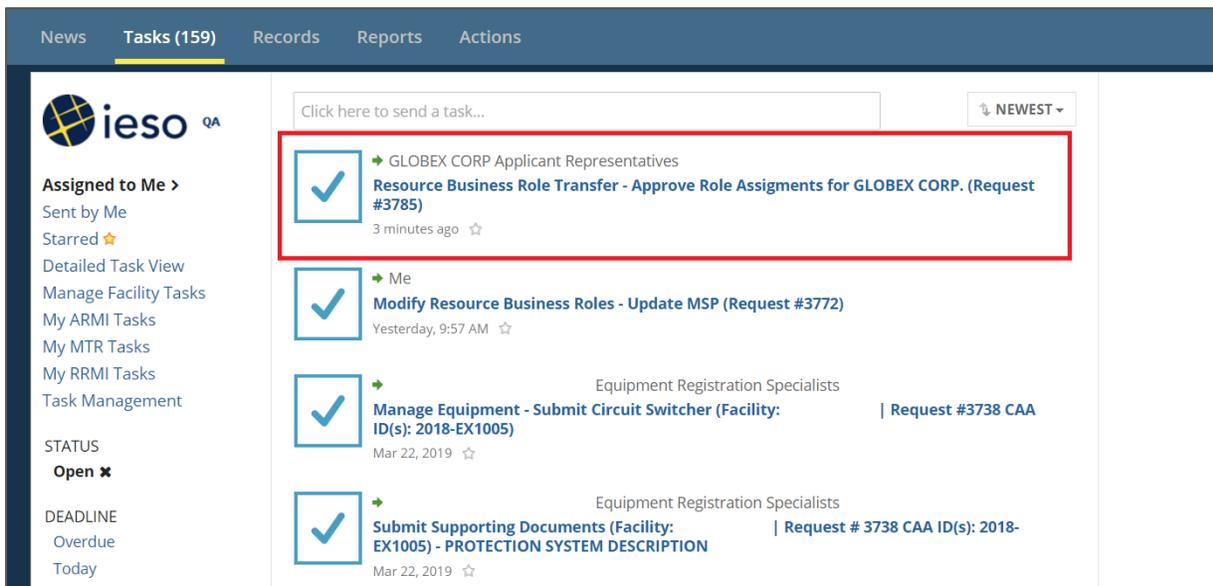
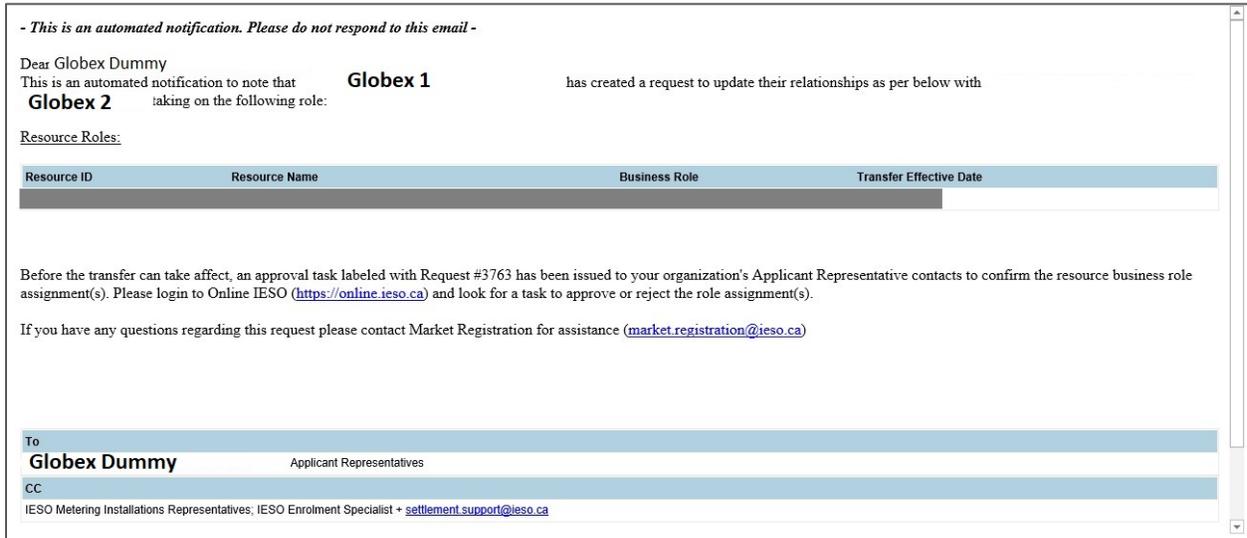
Organization ID: [REDACTED]	Request Number: 3526
Organization Name: [REDACTED]	Request Type: Modify Resource Business Roles
Facility Name:	Request Start Date: 11/7/2018 3:57 AM EST
	Request Status: In Progress

\* Cancellation Reason: for testing

BACK ABORT CANCELLATION CONFIRM CANCELLATION

# 4.0 Reviewing Role Assignments

Once an assignment task has been issued, an email notification will be generated and sent to the assignee. As the assignee, login to the online IESO and go to "Tasks" where you should see the corresponding latest assignment task.



Accept the task, review the details and proceed.

News **Tasks (159)** Records Reports Actions Applan

You must accept this task before completing it ACCEPT GO BACK REASSIGN

## Resource Business Role Assignment

### Request Details

Organization [REDACTED] Request Number 3785

Request Type Modify Resource Business Roles (MSP)

Amy Apprep (jitu.patel@princetonblue.com) at [REDACTED] has assigned the following resource business role(s) to your organization **GLOBEX CORP.**

Please review the assigned roles and confirm that your organization has approved the new relationships.

Resource ID	Resource Name	Assigned Business Role	Effective Date
[REDACTED]	[REDACTED]	MSP	4/23/2019
[REDACTED]	[REDACTED]	MSP	4/23/2019
[REDACTED]	[REDACTED]	MSP	4/23/2019

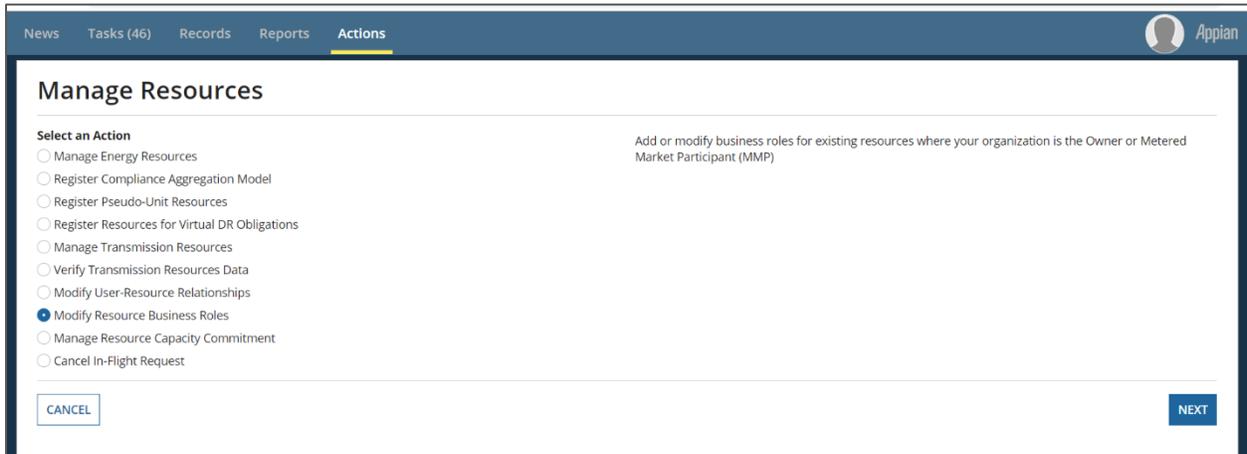
### Meter Installations

**Acknowledge**

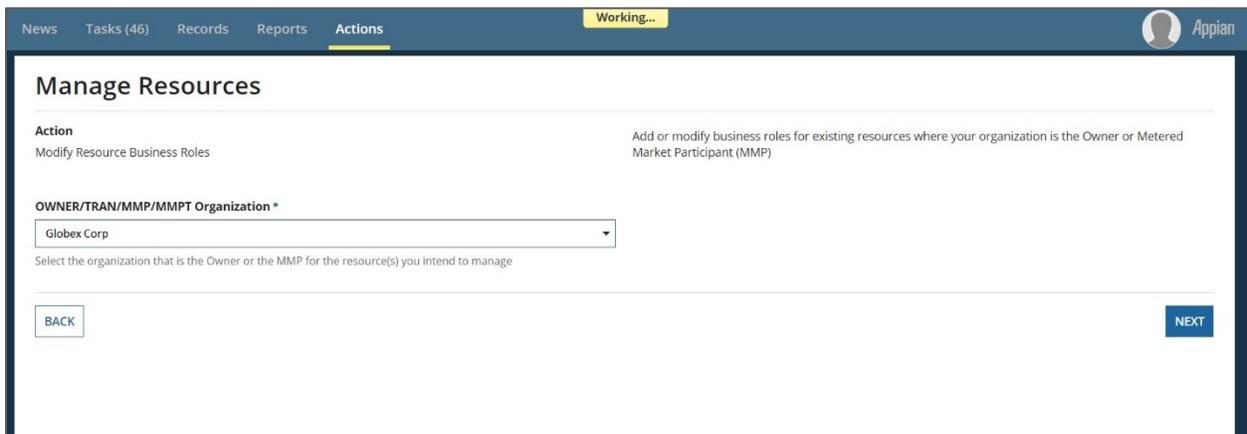
I understand that by accepting the role as a Meter Service Provider for the above resources I accept to be the Meter Service Provider for the following Meter Installations

# 5.0 Future owner/transmitter assigns MMP/MMPT

1. Login as the future owner/transmitter
2. Go to "Actions" tab on the top
3. Go to "Manage Resources"



4. Select "Modify Resource Business Roles", then click "Next"



5. Pick the "Organizational Business Role".

**Note:** If the option "Or select Organizational Business Role(s) you intend to Modify as future dated Owner" does not show up, and you have received a confirmation email from IESO with regards to future owner change, please contact IESO meter installations.

## Modify Resource Business Roles

This process will allow you to establish or transfer business roles for resources where your organization is either the Owner or Metered Market Participant (MMP).

**Organization**  
Globex Corp

**Request Number**  
3687

### Select Organizational Business Role(s) you intend to Modify

- Registered Market Participant (RMP)
- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)
- Meter Service Provider (MSP)
- Meter Data Associate (MDA)
- Local Distribution Company (LDC)

### Or select Organizational Business Role(s) you intend to Modify as future dated Owner. \*

- Metered Market Participant (MMP)
- Metered Market Participant Transmission Tariff (MMPT)

CANCEL

NEXT

6. Follow the instructions, click "submit" after done

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## Modify Resource Business Roles - Select Resources

### Request Details

**Organization** Globex Corp **Request Number** 3689  
**Request Type** Modify Resource Business Roles (MMP)

Select the organization you intend to use as the new MMP. \*

When do you want this change to be effective? \*

Display Resources that belong to

--All Facilities--

### Resource Selection \*

Please select the resources for which you want to transfer the business role to a new organization.

<input type="checkbox"/>	Resource ID	Resource Name	↑ Resource Type	Facility Name	Current MMP Organization	Selected Resource(s)
<input type="checkbox"/>						None
<input type="checkbox"/>						

## Confirm Resource Business Role Assignment

### Request Details

**Organization** Globex Corp

**Request Number** 3687

**Request Type** Modify Resource Business Roles (MMP)

You requested to assign **Globex Dummy** as the Metered Market Participant (MMP) for the resources below with a proposed effective date **3/14/2019**.

Please confirm that the data below is correct.

Resource ID	Resource Name	Assigned Business Role	Effective Date
		MMP	3/14/2019

[BACK](#) [CONFIRM](#)

# Related Documents

Metering Forms Automation Project: Market Trial Test Plan

– End of Document –