

### **Introduction**

This edition of **Quick Takes** provides instructions for viewing reports via the IESO Reports site.

Participants use the Reports site to retrieve confidential reports such as settlement statements, invoices, operational reports and dispatch advisories, as well as some IESO public reports.

You need only a user name and password to access your confidential reports via the password-protected section of the Reports site – you do not need to use a PKI certificate.

### **Background**

Both public and confidential reports are available on the IESO Reports site. The majority of reports are in XML format (see [Quick Take 12: Accessing IESO Reports Formatted in XML](#)).

The *Consolidated Report Listing*, available on the [Technical Interfaces](#) page, provides a complete listing of our reports, where they are available and in what file format, as well as the report retention period.

For many reports, you can:

- View the most recent version of the report
- View the latest version of the report within a specific reporting time period
- Automatically refresh while viewing a report
- Use filtering and sorting options

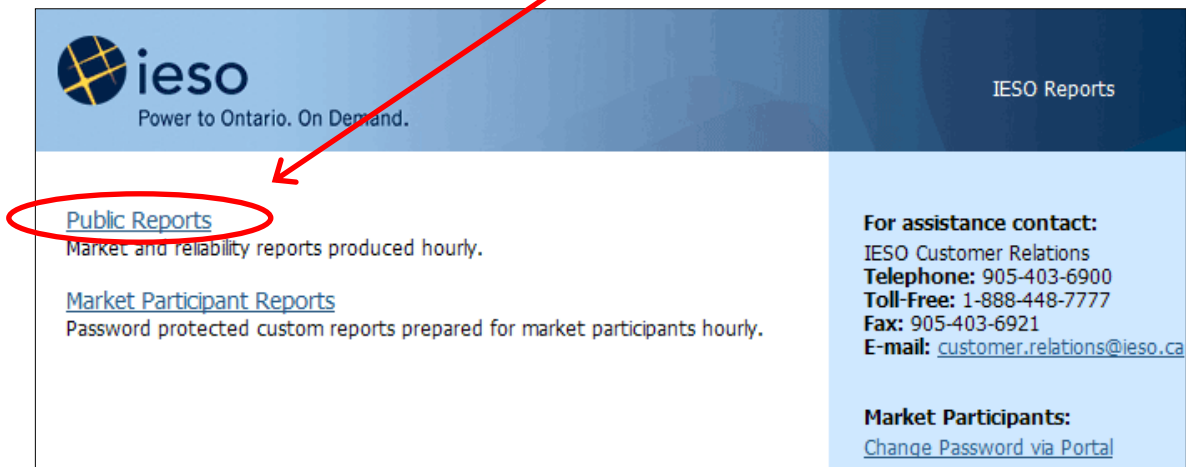
## Accessing the Reports Site

### RETRIEVING PUBLIC REPORTS

**Step 1:** Type the URL <http://reports.ieso.ca/index.html> into the address line on your browser, or click the link on the Inside the Market home page:








**Step 2:** To view public reports, select **Public Reports**.











The list of IESO public report folders appears.

**Step 3:** Click on the report folder you wish to view.

<a href="#">Name</a>	<a href="#">Last modified</a>	<a href="#">Size</a>	<a href="#">Description</a>
 <a href="#">Parent Directory</a>		-	
 <a href="#">Adequacy/</a>	03-Dec-2010 10:13	-	Adequacy Report
 <a href="#">DACPAdequacy/</a>	03-Dec-2010 01:10	-	DACP Adequacy Report
 <a href="#">DACPPredispPrices/</a>	03-Dec-2010 01:10	-	DACP Predispach Prices Report
 <a href="#">DACPReliabilityCommit/</a>	03-Dec-2010 01:10	-	DACP Reliability Commitment Report

The list of reports available within the folder appears:

<b>Generator Output and Capability</b>				
<u>Name</u>	<u>Last modified</u>	<u>Size</u>	<u>Description</u>	
 <a href="#">Parent Directory</a>		-		
 <a href="#">PUB_GenOutputCapability.xml</a>	03-Dec-2010 10:35	183K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100905.xml</a>	06-Sep-2010 04:03	410K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100905_v25.xml</a>	06-Sep-2010 04:03	410K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100906.xml</a>	07-Sep-2010 04:03	410K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100906_v25.xml</a>	07-Sep-2010 04:03	410K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100907.xml</a>	08-Sep-2010 04:03	426K	Generator Output and Capability	
 <a href="#">PUB_GenOutputCapability_20100907_v25.xml</a>	08-Sep-2010 04:03	426K	Generator Output and Capability	

**Link to the most recent update** (also called the 'global link')

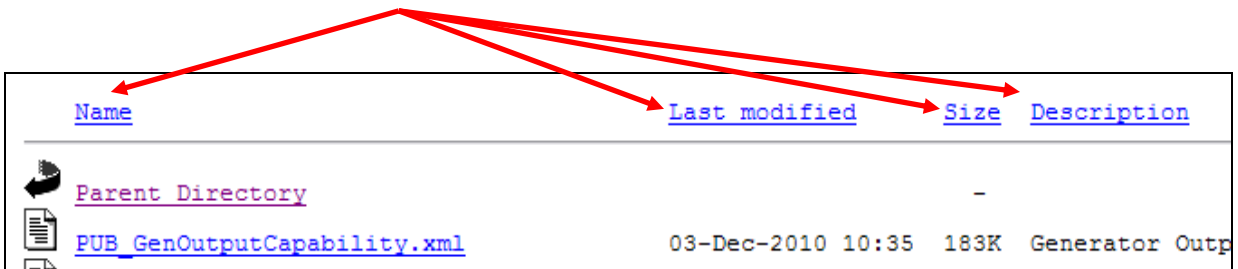
Note that the first file listed has no date/time or version number. It always links to the most recent version of the report. In this example, the file named **PUB\_GenOutputCapability.xml** is the most recent version of the *Generator Output and Capability* report.



**Link to the most recent update within a specific reporting time period** (also called the 'local link')

You can also link to the most recent report within a specific reporting period. For example, you can use the link to view the most recent report for a specific date. The file name has the date or date/time, but no version number. In this example, the file named **PUB\_GenOutputCapability\_20100907.xml** is the last version issued of the *Generator Output and Capability* report for September 7, 2010.

### Sorting and Searching/Filtering

You can sort the files by Name, Last Modified, Size or Description – in either ascending or descending order.



<u>Name</u>	<u>Last modified</u>	<u>Size</u>	<u>Description</u>	
 <a href="#">Parent Directory</a>		-		
 <a href="#">PUB_GenOutputCapability.xml</a>	03-Dec-2010 10:35	183K	Generator Outp	

If you wish to refine your search, you can add information (filters) to the URL. The filtering conventions are similar to those used for DOS and UNIX. Below are a few examples of filters you may find useful. In all cases, simply replace the report name if you wish to filter for a different report. Keep in mind that you can bookmark web pages once you have applied the desired filters. (For IESO report naming conventions, please refer to *External Document Naming Convention, Information Technology Standard* available via our [Technical Interfaces](#) web page, under 'XML and Automated Documents'.)

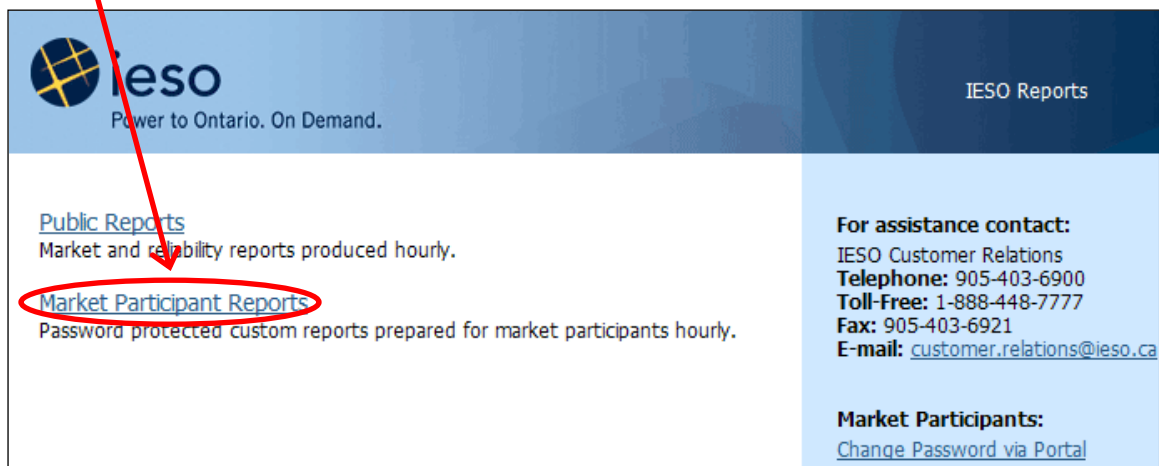
### Filtering Examples

To go directly to the *Generator Output and Capability* report folder, change <http://reports.ieso.ca/index.html> to <http://reports.ieso.ca/public/GenOutputCapability> then press **Enter**.

To view the Generator Output and Capability reports for September 7, 2010, add a date filter to the URL: **/PUB\_GenOutputCapability\_20100907.xml**

### RETRIEVING CONFIDENTIAL REPORTS

To access your confidential reports, enter **https://reports.ieso.ca/private/MPname/** in the URL address field, or select **Market Participant Reports** from the public URL entry page.



The screenshot shows the IESO Reports website interface. At the top left is the IESO logo with the tagline "Power to Ontario. On Demand." At the top right, it says "IESO Reports". Below the logo, there are two main sections. The left section has two links: "Public Reports" (with a description "Market and reliability reports produced hourly.") and "Market Participant Reports" (with a description "Password protected custom reports prepared for market participants hourly."). The "Market Participant Reports" link is circled in red, and a red arrow points from it towards the top left. The right section contains contact information: "For assistance contact: IESO Customer Relations, Telephone: 905-403-6900, Toll-Free: 1-888-448-7777, Fax: 905-403-6921, E-mail: customer.relations@ieso.ca". Below this is "Market Participants: Change Password via Portal".

The logon pop-up window appears:



Enter your user name and password to access your reports. (If you need a user name and password, please contact your account manager.)

### Available Features

Note that all the features available for public reports (link to latest version, sort and search/filtering capabilities) are also available for confidential reports.

### Automatic Screen Refresh

An automatic screen refresh option is available for dispatch advisories. If you click on the file named **refresh.htm**, the report will automatically refresh every 30 seconds.

Name	Last modified	Size	Description
<a href="#">Parent Directory</a>		-	
<a href="#">CNF-GenA_DispAdvisory.xml</a>	26-Nov-2010 04:03	1.2K	Dispatch Ac
<a href="#">CNF-GenA_DispAdvisory_20101125_v1.xml</a>	25-Nov-2010 01:35	43K	Dispatch Ac
<a href="#">CNF-GenA_DispAdvisory_20101125_v2.xml</a>	25-Nov-2010 02:35	73K	Dispatch Ac
<a href="#">CNF-GenA_DispAdvisory_20101125_v3.xml</a>	25-Nov-2010 03:35	42K	Dispatch Ac
<a href="#">CNF-GenA_DispAdvisory_20101125_v4.xml</a>	25-Nov-2010 04:35	47K	Dispatch Ac
<a href="#">CNF-GenA_DispAdvisory_20101125_v5.xml</a>	25-Nov-2010 05:35	52K	Dispatch Ac
<a href="#">refresh.htm</a>	25-Nov-2010 06:35	1.2K	

When you are viewing the report, a message in the bottom left corner of the screen tells you when the next refresh is expected, e.g., **Screen will refresh in 28 seconds.**

Note: At this time, the public reports and other confidential reports do not offer the automatic refresh feature. If you wish to refresh the screen while viewing these reports, click the **Refresh** button on your browser, or right click your mouse, then click **Refresh.**

## **Report Retention**

The *Consolidated Reports Listing*, available on our [Technical Interfaces](#) web page, lists the number of days we will leave each report on the Reports site. If you need to access reports that are no longer on the Reports site, please contact Customer Relations.

## **Version Retention**

Please note that we will remove the report 'versions' after 10 calendar days, leaving only the most recent update (global link), the most recent update within a specific reporting time period (local link) and the latest version (the 'latest version' points to the same document as the local link) – see page 3 for examples.

## **Summary**

You can retrieve many public reports and all of your confidential reports (including your settlement statements, invoices, and operational reports) via our Reports web site.

## **Additional Information**

- For information on viewing, downloading and printing IESO reports formatted in XML, please see [Quick Take 12: Accessing IESO Reports Formatted in XML](#)
- For information on the application programming interface (API) for automating retrieval of XML reports, see the *Outbound Automated Document, Application Programming Interface (IMO\_SPEC\_0100)*, available on our [Technical Interfaces](#) web page.
- To obtain a user name and password, please contact us at:  
Toll Free: 1-888-448-7777  
Tel: (905) 403-6900  
Fax: (905) 403-6921  
Email: [customer.relations@ieso.ca](mailto:customer.relations@ieso.ca)