

# Stakeholder Engagement Plan SE-24

## Report Site Transition

Revision 3



Revision 1: Revised December 20, 2006 based on feedback from working group members during the December 5th meeting. See minutes for details.

Revision 2: Revised January 26, 2007 based on e mail feedback from working group members. Revision was adding item #8 on the schedule.

Revision 3: Revised February 7, 2007 to remove reference to Web Services API.

### I. Introduction and Background

The purpose of this plan is to determine an acceptable time schedule for the migration of existing reports to a single report location and a standard report format.

Over the next few years, the IESO will proceed with a program to enhance existing reports. The most significant component of this will be the conversion of reports to XML format. In addition, existing reports will be moving from the Market Participant Interface (MPI) and [anonymous FTP site](#) into the IESO Reports Site and eventually a new location within the [IESO portal](#). For more information on the portal, please see: <http://www.ieso.ca/imoweb/pubs/training/portal.pdf>

The presentation of reports and the ability to read them with a machine is greatly improved through the use of XML. More information on XML reports can be found at:

[http://www.ieso.ca/imoweb/pubs/ti/Market\\_Results/XMLprimer.pdf](http://www.ieso.ca/imoweb/pubs/ti/Market_Results/XMLprimer.pdf)

Although, as noted above, IESO's long term goal is to move the reports within the IESO portal, initially, XML versions of the reports will be published to the [IESO report site](#), allowing stakeholders to migrate to the new reports at their own pace. The existing CSV and TXT formats of the reports, will be also be made available via the reports web site as well as remaining accessible to participants through the MPI/API and anonymous FTP site. At a later date, the IESO reports site will be integrated into the IESO portal with an improved navigation user interface.

Several options will be considered on how to migrate the current reports to the new format and location to minimize impact to stakeholders. Both human and machine readable versions of the reports will be restructured in consultation with stakeholders to ensure the reports continue to meet their business needs.

### II. Stakeholders

The format and location of reports is of interest to all stakeholder sectors, including market participants and the general public.

### **III. Stakeholder Engagement Goals and Objectives**

#### Goal

The goal of this stakeholder plan is to provide stakeholders the opportunity to provide input and feedback to the IESO on the impact on their business to accommodate a change in the report format and move to a single location for report retrieval.

#### Objective

1. To provide stakeholders the opportunity to review and provide feedback on this stakeholder plan and on the implementation impacts on their business e.g., when will stakeholders be ready to move to a single location to access their reports and when will stakeholders be able to use XML reports instead of CSV and TXT reports;
2. To provide stakeholders with the opportunity to provide alternatives that would reduce any impacts on their business; and
3. To minimize adverse effects on market participant operations and processes to the extent possible.

### **IV. Stakeholder Engagement Approach and Methods**

The stakeholder engagement will be stakeholder consultation which is seeking stakeholder input on decisions on the key deliverables involving two-way face to face dialogue.

The stakeholder engagement methods to be employed will be the formation of a Working Group consisting of representatives from each directly affected sector, and web-based postings with the opportunity for comment.

The implementation of this stakeholder engagement plan will be in accordance with the IESO's approved stakeholder engagement principles.

This stakeholder plan provides all stakeholders with the opportunity to communicate their views and positions directly to the IESO in advance of any implementation.

All stakeholder input, including dissenting views, will be posted on the IESO website. All feedback will be considered prior to implementation of any changes to the report format or location. Feedback will be provided on all stakeholder comments and how this input was considered, and the results of the consultation will be posted on the IESO website.

All public manuals and technical documents would be updated to reflect any changes.

#### Working Group

The formation of a representative stakeholder working group will provide the opportunity for directly affected stakeholders to provide more detailed working level input so that the objectives can be met in a timely manner. It is proposed that the working group consist of balanced representation of stakeholders.

To the extent possible, members of the working group will also represent the views of their constituency. The size of each of the working groups would be limited and we anticipate that up to two individuals from each company may attend, one representing the business side and another representing information technology.

A draft terms of reference for the working group has been prepared for review in advance of its first meeting to ensure mutual understanding of objectives and process. Working group meeting agendas and documentation from the meetings will be made public through the IESO web site. Notes from meetings will be posted for all other stakeholders to provide comments which can be provided directly in writing or through a sector representative.

IESO management will use the feedback from the working group as a significant factor to implementing any changes.

Interested stakeholders are asked to send an e-mail to [stakeholder.engagement@ieso.ca](mailto:stakeholder.engagement@ieso.ca) by **November 24, 2006**.

#### Web-Based Postings

Web-based postings provide all interested stakeholders with an efficient low-cost method to be informed of the proposed changes with the opportunity to communicate their views via e-mail to the IESO ([stakeholder.engagement@ieso.ca](mailto:stakeholder.engagement@ieso.ca)).

#### Development of Market Manuals

The implementation phase of this initiative will centre upon the updating of sample reports, technical interface documentation and market manuals, as appropriate.

## V. Decision Making Process

<b>Stakeholder Engagement Schedule</b>	
<b>Activity</b>	<b>Target Date</b>
1. Post stakeholder plan and e mail to stakeholders to solicit nominations for membership in the Working Group.	Early November, 2006
2. Deadline for working group nomination and for comments on the draft stakeholder plan.	November 24, 2006
3. Announcement of members of the Working Group.	Late November, 2006
4. First working group meeting.	December 5, 2006
5. Additional meetings of the working group.	January to June, 2007
6. Posting of proposed road map.	Early July, 2007
7. Meeting for all stakeholders to solicit feedback on the road map, webcast or face to face - to be determined	Mid July, 2007
8. Opportunity for feedback from the Stakeholder Advisory Committee	August 22, 2007
9. Deadline for comment on road map.	End of August, 2007
10. Posting of final road map.	September, 2007

### Process Evaluation

Stakeholders will be provided the opportunity to provide feedback on the effectiveness of the process in achieving stated objectives.