IMP_GDE_0098

GUIDE

Meter Trouble Report

A Guide for Market Participants

Issue 6.0

This document is a guide for market participants to the use of the Meter Trouble Report workflow application.

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5.0	Updated the Screen shots for Sections (2.12 and 3.2). Added comments for refreshing the worklist item	April 4, 2005
6.0	Updated Screen Shots for VCR 324	September 14, 2005

Related Documents

Document ID	Document Title
IMP_GDE_0103	The Applications Status Tool – A User Guide
IMP_GDE_0101	The Workflow Environment – A Guide for Market Participants

– End of Section –

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Reference (Section and Paragraph)	Description of Change
Throughout	Text referencing IMO Changed to IESO
Throughout	Screen shots containing IMO logo/name updated to reflect IESO logo/name

End of Section –

1. Introduction

1.1 Purpose

This document is a guide to use of the *Meter Trouble Report* workflow application by *market participants*. It describes those aspects of the Meter Trouble Report form and the associated workflow, which are immediately pertinent to the role of the *metering service provider* in resolving metering problems.

1.2 Scope

This document describes the functionality specific to the *meter trouble report* application that is available to *market participants* through the web portal. The user guide does not describe the functionality of the Workflow Environment, which is common to all workflow applications. This is described in a separate document.

1.3 Who Should Use This Document

This document is intended for the use of *market participants*.

1.4 Conventions

Double quotation marks are used to indicate titles of legislation, publications, forms, and other documents. Bold fonts are used for emphasis. Italics are used for terms defined in the *Market Rules.*

1.5 Overview

A *meter trouble report* is a report issued in response to a perceived problem in a metering device. The *meter trouble report* is contained in a form that displays the details of a single trouble report, which can consist of as many as 10 error records per meter.

These errors can be reported either by the recorder, a device controlled by the *IESO*, *metered market participant* or by the *metering service provider*. Errors reported by the recorder cause the automatic creation of a report. Reports for errors reported by the *metering service provider or metered market participant* are created manually by *IESO* personnel.

All trouble reports are initiated by the *IESO*, either automatically or manually. When a *meter trouble report* is created it is placed in the worklist of the associated *metering service provider*. The *metering service provider* acknowledges receipt of the report and submits a proposed solution.

1.6 Workflow

The *meter trouble report* application applies a structured workflow to the business of reporting and resolving meter problems. The *metering service provider*'s interaction with the application is As follows:

- The *IESO*, having issued a *meter trouble report*, sends the report to the *metering service provider* for acknowledgement. The *metering service provider* can enter a proposed resolution (or a completed one if the problem has been resolved) in the Resolution Report area of the MTR Resolution Log page. With or without such a proposed resolution, the *metering service provider* then acknowledges receipt of the *meter trouble report* by submitting the form to the *IESO*.

- The *IESO*, having received a proposed resolution from the *metering service provider*, requires changes to it, and send the form back to the *metering service provider*. The *metering service provider* makes the required changes and resubmits the form to the *IESO*.

– End of Section –

2. Home Page

This page is displayed when you select an existing *meter trouble report* from your worklist. The page contains no information fields. It does, however, hold a number of command buttons that allow you to navigate among the pages of the report and to perform actions that pertain to the entire *meter trouble report*.

2.1 Command Buttons

2.1.1 Pages

At the top of this and all subsequent pages is a group of seven buttons, each of which displays the labeled page:

MTR Details

Displays the Trouble Report Details page of the form.

MTR Receipt

Displays the Trouble Report Receipt page of the form.

Contact Information

Displays the Contact Information page of the form.

The last two buttons are for pages visible to *IESO* personnel only.

2.1.2 Procedures applicable to MSP

At the bottom of each page is a set of five command buttons that perform procedures on the form.

Print

Displays a simplified form containing all the information in the current trouble report. Having examined the display you can either print it and return to the page on which the Print button was pressed, or return without printing the simplified form.

Print

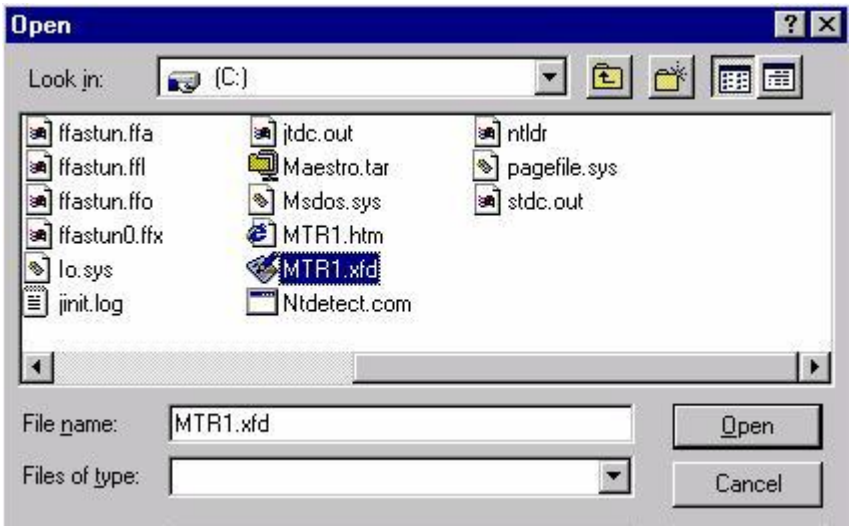
Prints the form as displayed. A standard Windows Print dialog allows you to select a printer if need be.

Return

Returns to the screen on which the **Print** button was pressed.

Open Data

Opens the data content of a *meter trouble report* form, which has been saved *locally* in .xfd (XML Form Data) format. A standard Windows Open dialog allows you to locate the file. See also “Working Offline”.



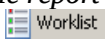
Save Form

Saves the current *meter trouble report* form *locally* in .htm (HTML) format. A standard Windows Save As dialog allows you to name the file and save it in an appropriate folder. See also "Working Offline".

Save Data

Saves the data content of the current *meter trouble report* form *locally* in .xfd (XML Form Data) format. A standard Windows Save As dialog allows you to name the file and save it in an appropriate folder. See also "Working Offline".

Submit

Submits the *meter trouble report* form to the *IESO*. The request is automatically stamped with the date and time of submission. The transmission itself is managed by the *meter trouble report* application. Once the *meter trouble report is submitted*, you will have to refresh the worklist by clicking on the worklist icon 

in the toolbar menu. This will refresh the worklist, which will include your change.

2.2 Help

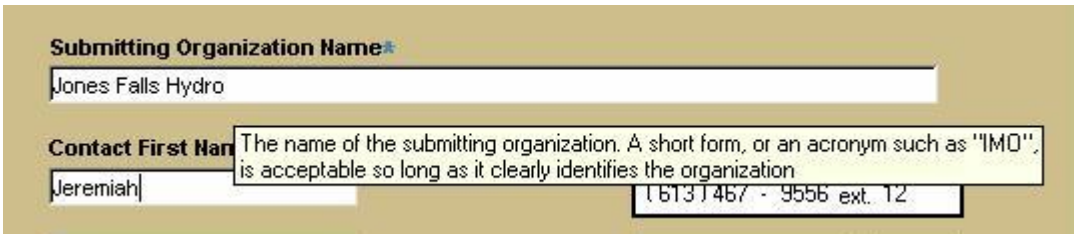
Two levels of Help will be provided, the first of which is invoked by a command button.

Help

Displays the initial topic of online Help, together with the Table of Contents, through which you can display any other page.

Field Help – Unavailable in this release

Field-level Help consists of field definitions that can be displayed by holding the cursor over any field (“hovering”) without clicking.



2.3 Attachments

At the bottom of the frame that contains the *meter trouble report* form is an Attachments box containing an icon and a title for every document attached to the *meter trouble report*. In the example the icon represents a .pdf file. All attachments that are attached by the IESO user will be Read Only to the MSP user. For the MSP user, once the MTR is updated or submitted, all attachments will be Read Only and cannot be deleted by that user.

To attach a document to a *meter trouble report* form, press the **Insert** button at the left. A standard Windows Open dialog is displayed, in which you can identify and attach the document. To detach a document, right-click on its icon and select Delete from the menu displayed. An MSP user can delete an attachment only before the MTR is submitted or updated.

– End of Section –

3. MTR Details Page

The information on this page identifies the problem or problems to which the report pertains.

3.1 Report Identification Fields

At the top of the page is a group of fields that appears on every page of the meter trouble report except the Home Page, with values assigned as below.

Trouble Report ID

The unique identifier assigned to the *meter trouble report* by the *IESO*, displayed only when the *meter trouble report* has been issued.

Recorder ID

The unique identifier assigned to the Meter Point by the *IESO*. This value is specified on the Initiation Page.

Zone

The zone assigned to the recorder ID.

MSP ID

The unique identifier assigned to the *Metering Service Provider* by the *IESO*. Derived by the application from the Recorder Id.

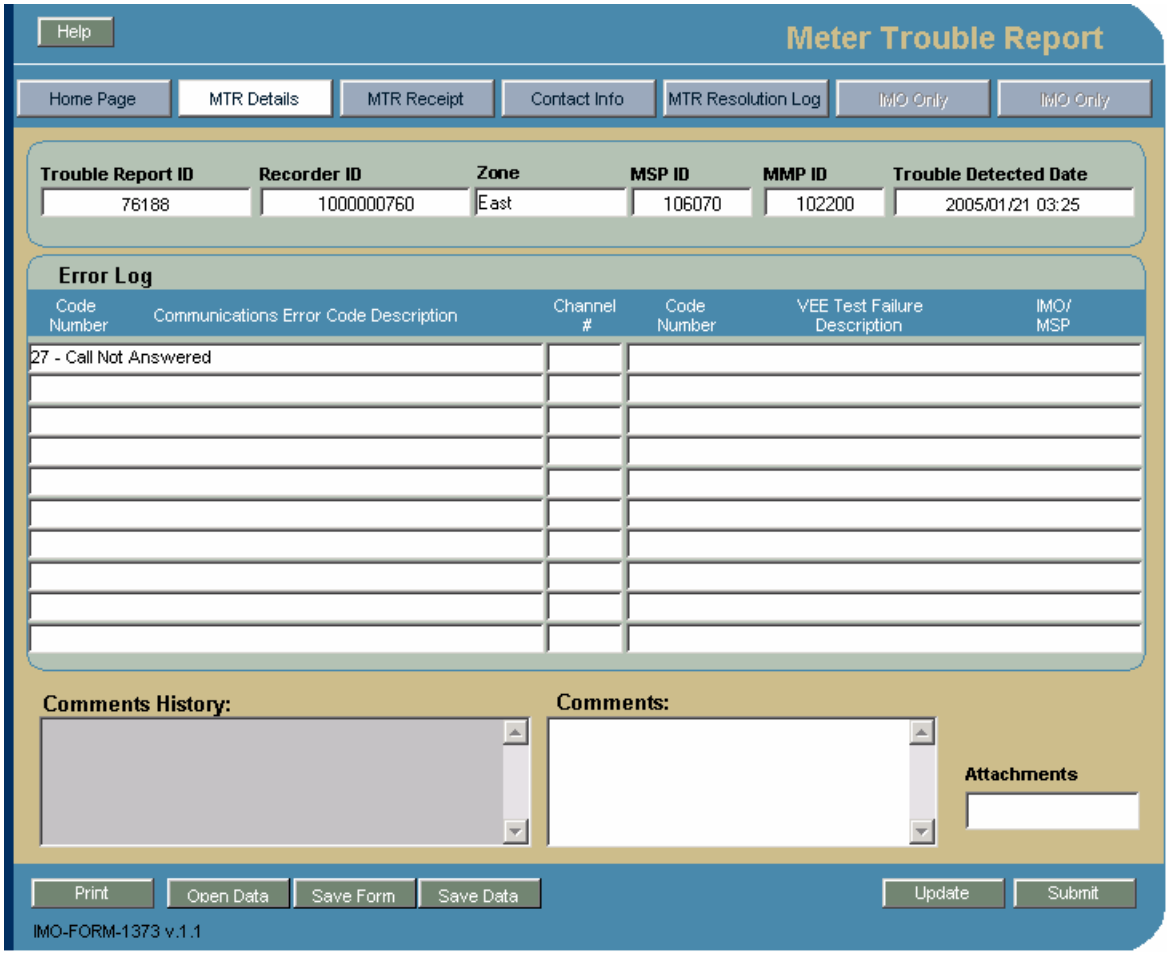
MMP ID

The unique identifier assigned to the *Metered Market Participant* by the *IESO*, selected from a pick list of *Metered Market Participant* Ids associated with the previously selected Recorder ID. Derived by the application from the Recorder Id.

Trouble Detected Date

The date on which the errors constituting the trouble report were detected. . This value is specified on the Initiation Page.

3.2 Trouble Report Details



The Trouble Report Details page displays the details of a single trouble report, which can consist of as many as 10 errors, one for the as many as 14 channels monitored by a recorder located at the interface between a *metering service provider* and a *metered market participant.*

These errors can be reported by any of the Recorder, a device controlled by the *IESO*, the *metered market participant* or the *metering service provider*. Errors reported by the recorder are entered automatically in Error Log, and are read-only. Errors reported by the *metered market participant* or *metering service provider* are entered manually by *IESO* personnel.

Most errors are identified either by a Communications Error Code Description or by a VEE Test Failure Description.

A single trouble report can contain as many as ten Communications or VEE Test Failure errors, but not a combination of the two types. If errors of both types occur in the same recorder, a separate trouble report must be issued for each.

3.3 Error Log

This log contains a list of all the errors that constitute the trouble report.

Channel

The number of the channel in which the error has occurred. If entered manually, the value is selected from a pick list: 1 to 14, or All.

Code Number

The code that identifies the nature of the error. If entered manually the value is selected from a pick list. When a Code Number is entered, the corresponding Error Code Description is displayed automatically. If there are values in the Code Number and Error Code Description fields, then the VEE Test Failure Description field is empty.

Communications Error Code Description

A brief textual description of the error. If entered manually, the value is selected from a pick list. When an Error Code Description is entered, the corresponding Code Number is displayed automatically. If there are values in the Code Number and Communications Error Code Description fields, then the VEE Test Failure Description field is empty.

VEE Test Failure Description

A brief textual description of the Validation Error Test Failure. If entered manually, the value is selected from a pick list. If there is a value in the VEE Test Failure Description field, then the Code Number and Communications Error Code Description fields are empty.

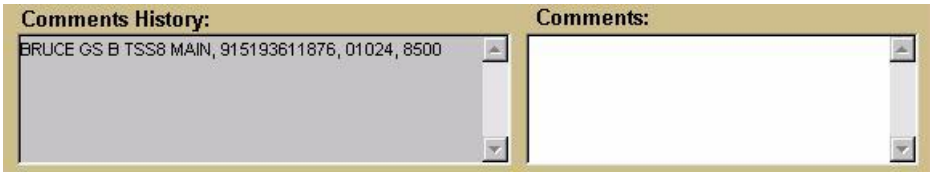
Comments History / Comments

The Comments History field contains all comments entered in the Comments field during previous sessions: that is, when text is entered in the Comments field, and the MTR is then submitted, that text appears in the Comments History field the next time the trouble report is opened.

The Comments field is used in three ways:

1. If "C00 - Others - *IESO*" has been selected in the VEE Test Failure Description pick list, then the Comments field contains a textual description of the error.

2. When a communications error causes the automatic initiation of an MTR, the description of the error appears in this field, as below.



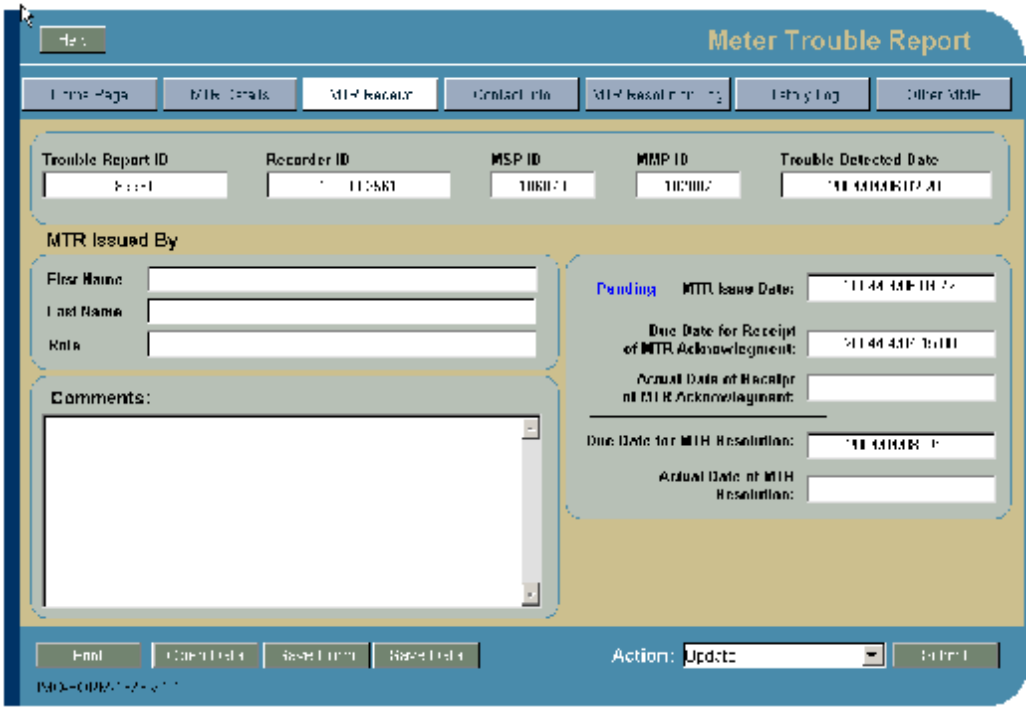
(This description has been transferred to the Comments History field because the trouble report has been initiated and submitted automatically, and then opened.)

3. Until the MTR is issued, and the data frozen, *IESO* personnel can also use this field for comments.

– End of Section –

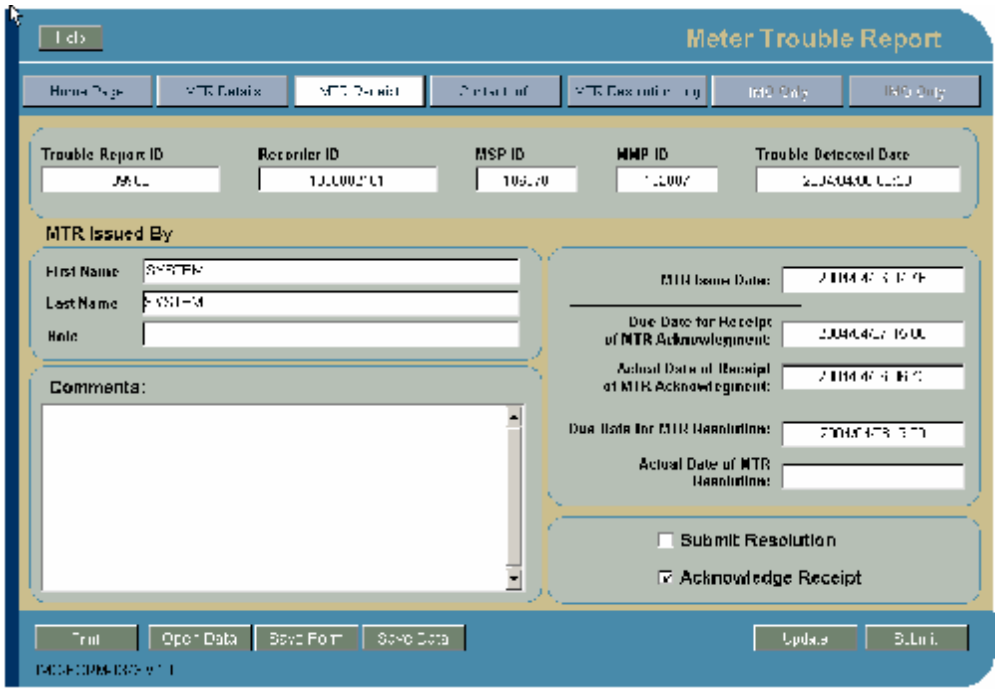
4. MTR Receipt Page

This contains information on the status of the *meter trouble report*: who issued it, when, and why (Comments), its place in the workflow (Pending), and due and actual dates for acknowledgement and resolution.



In the example, below, the *IESO* has issued the *meter trouble report* and sent it to the concerned *metering service provider* for acknowledgement, and perhaps for a proposed resolution. The report now has a Trouble Report ID, and the name of the person who issued the *meter trouble report* appears in the MTR Issued By section.

Two new checkbox fields are displayed at the lower right: Submit Resolution and Acknowledge Receipt, which are explained below. Only these fields, together with the Comments field, are available for input from the MSP.



4.1 Report Identification Fields

See "Trouble Report Details Page".

4.2 MTR Issued By

First Name

The first name of the *IESO* person who has issued the trouble report. Entered automatically when the MTR is issued.

Last Name

The last name of the *IESO* person who has issued the trouble report. Entered automatically when the MTR is issued.

Role

The business role of the *IESO* person who has issued the problem report. Entered automatically when the MTR is issued, if relevant.

Comments

Optional textual commentary by the *metering service provider* on any aspect the MTR resolution process. For example, if the *metering service provider* decides not to check the Submit Resolution box, this field can be used to explain why.

4.3 Date Fields

MTR Issue Date

The date on which the trouble report was issued. The two Due Dates are calculated from the value in this field.

Due Date for Receipt of MTR Acknowledgement

This date/time is calculated automatically as 3:00 p.m. on the business day after the day on which the trouble report was issued. See MTR Issue Date above.

Actual Date for Receipt of MTR Acknowledgement

The actual date on which the MTR acknowledgement was received.

Due Date for MTR Resolution

This date is calculated automatically as two business days after the date (9:00 A.M) on which the trouble report was issued. See MTR Issue Date above.

Actual Date for MTR Resolution

The actual date on which the MTR was resolved.

4.4 Submission Fields

When the MTR is issued a further set of two checkbox fields is added:

Submit Resolution

Checking this field indicates that the *metering service provider* has entered a proposed resolution to the trouble on the MTR Resolution Log page. When this box is checked, the Acknowledge Receipt box below is automatically checked.

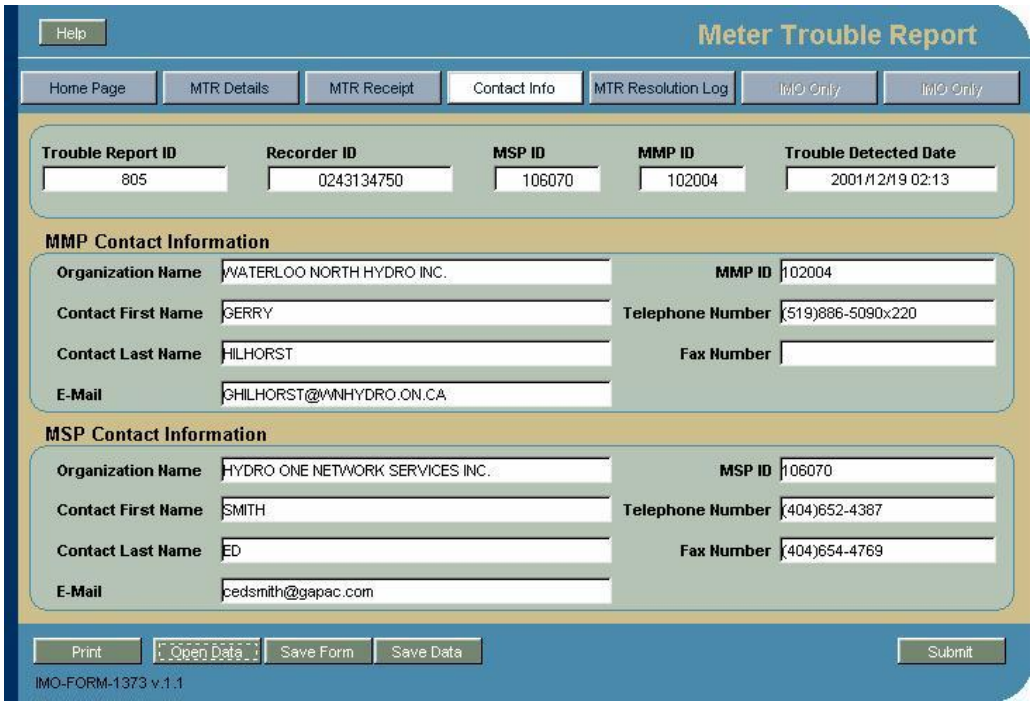
Acknowledge Receipt

Checking this field indicates the *metering service provider* acknowledges receipt of the *meter trouble report*. The *metering service provider* must acknowledge receipt of the *meter trouble report* within one business day of the MTR Issue Date.

– End of Section –

5. Contact Information Page

The *metered market participant* and *metering service provider* contact information is derived from the MMP ID and MSP ID specified during the initiation procedure. For each *metering service provider* there may be more than one *metered market participant*, in which case one of these is designated as the primary *metered market participant*. The contact information on this page pertains to the primary *metered market participant*.



5.1 Report Identification Fields

See "Trouble Report Details Page".

5.2 Metered Market Participant (MMP) Contact Information

Organization Name

The name of the *metered market participant* organization.

MMP ID

The MP Id of the *metered market participant* organization.

Contact First Name

The first name of the contact for the *metered market participant.*

Contact Last Name

The last name of the contact for the *metered market participant.*

E-Mail

The e-mail address of the contact for the *metered market participant*.

Telephone Number

The telephone number of the contact for the *metered market participant*.

Fax Number

The fax number of the contact for the *metered market participant.*

5.3 Metering Service Provider (MSP) Contact Information

Organization Name

The name of the *metering service provider* organization

MMP ID

The MP Id of the *metering service provider* organization.

Contact First Name

The first name of the contact for the *metering service provider*.

Contact Last Name

The last name of the contact for the *metering service provider*.

E-Mail

The e-mail address of the contact for the *metering service provider*.

Telephone Number

The telephone number of the contact for the *metering service provider*.

Fax Number

The fax number of the contact for the *metering service provider*.

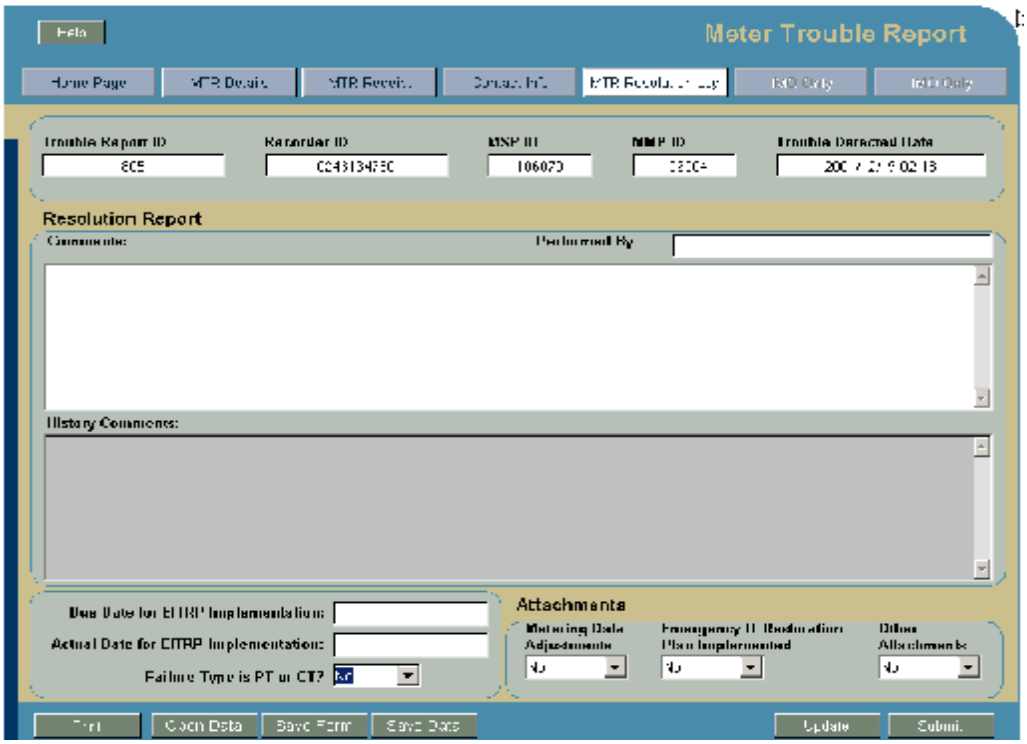
– End of Section –

6. MTR Resolution Log Page

This page contains a report of the proposed resolution of the problem: who is to perform it, details of the procedure, and details of attached documents such as Metering Data Adjustments and an Emergency Restoration Plan.

The fields on this page become active when the *metering service provider* checks the **Submit Resolution** box on the MTR Receipt page.

MSP is allowed to update the Comments field until submission of MTR to IESO. Once the MTR is successfully submitted, the information in the Comments field is moved to the History Comments field, which is Read Only and will include information about user, date and time of submission.



6.1 Report Identification Fields

See "Trouble Report Details Page".

6.2 Resolution Report

Performed By

The name of the person who is to perform the problem resolution.

Comments

Textual comments on, or description of, the proposed problem resolution.

Due Date for EITRP Implementation

That is, due date for the implementation of an Emergency Instrument Transformer Restoration Plan. Entered manually when an EITRP is attached (see below).

Actual Date for EITRP Implementation

Entered manually when the EITRP is implemented.

Failure Type is PT or CT?

That is, "Potential Transformer or Current Transformer "Yes or No", selected from a pick list. The default is No -- neither of these.

6.3 Attachments

Three Yes/No fields to indicate the nature of attachments, if any, to the report.

Metered Data Adjustments

Yes or No, selected from a pick list.

Emergency IT Restoration Plan Implemented

Yes or No, selected from a pick list.

Other Attachments

Yes or No, selected from a pick list.

References

Document Id	Document Name
MDP_RUL_0002	Market Rules for the Ontario Electricity Market

– End of Document –