

Outage Management Enhancements Market Participant Training

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Agenda

- Outage Management Process Update
- Outage Management Enhancements:
 - Intuitive Error & Warning Messages
 - Improve Submission Efficiency
 - Improve Functionality
- Next Steps

UPDATE

Outage Management Process - Update

- The new outage management system went live on October 26, 2016
- What was changed:
 - New outage tool
 - New outage process timelines
- Based on feedback received, various system enhancements are being incorporated to the tool

ENHANCEMENTS

Intuitive Error & Warning Messages

- New **alerts** to notify users which process an outage has been submitted into:
 - 1 Day, 3 Day, Weekly, Quarterly
- For example, if an outage has been entered into the **3 Day Assessment** process you will receive the following message:
 - *“**Assessment Eligibility: 3-Day Assessment Process ending 2017/01/08 16:00 EST**”*

Intuitive Error & Warning Messages – Cont'd

- **Lead time error** messages will now include the **next available submission date**
 - Excludes Forced, Forced Extended, Urgent, Informational and Opportunity outages
- For example, if an outage does **not meet** the **lead time requirements** you will receive an **error message** as follows:
 - *"The Planned Start must be on or after 2017/09/05 00:00:00"*

Intuitive Error & Warning Messages – Cont'd

- Missing or incorrect fields will now be **highlighted** before the outage can be submitted
 - All **mandatory fields**, until they are filled in
 - Except for the Equipment Requested field
 - **Planned Start Date**, if the **submission rules** are violated;
 - **Conflict Rationale**, if required;
 - **Equipment Description**, if required based on the Constraint Code

Intuitive Error & Warning Messages – Cont'd

- **Actual Start and End Times** will now be **validated** to ensure they **do not overlap**
 - Error message if the start time is earlier than the previous end time

Validation Error
There are the following validation errors:
The following error(s) occurred while checking conflicts:
The outage request has overlapping outage periods.

Outage Request: 0-00000000 rev. 1 Planned (New) Back New + Duplicate Home

Request Summary **Details** Study Attachments (0)

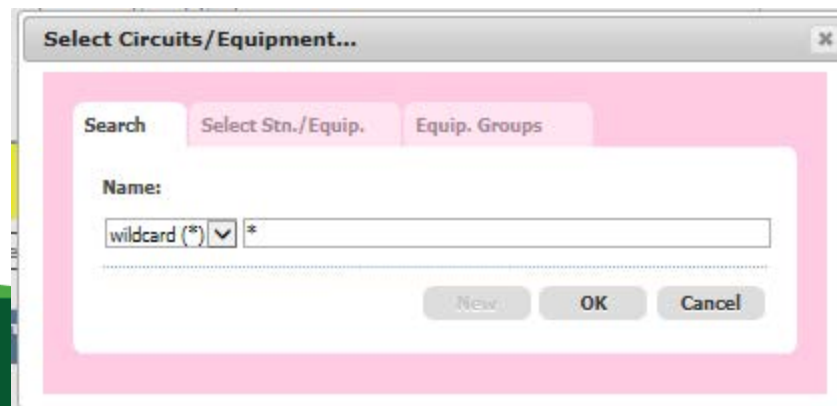
Outage Periods:

	Planned Start	Planned End	Actual Start Actual End	Equipment	Constraint	Status By/ When
✗	2017/08/30 08:00	2017/08/30 16:00	- -	G1	DRATE: 50 MW	
✗	2017/08/30 15:00	2017/08/30 23:59	- -	G1	DRATE: 50 MW	

Add...

Improve Submission Efficiency

- Equipment Search
 - A **wildcard (*)** has been defined to **speed up equipment entry** when adding equipment to an Outage Request
 - **Default** search will use the **wildcard** operator
 - An explicit **wildcard character** will be **displayed** in the search box



Improve Submission Efficiency – Cont'd

- Equipment Groups
 - Users can now create Equipment Groups.
 - Can **only** be created with equipment for which you have **permissions** to submit outages.
 - Can add the Equipment Group to an outage request instead of the individual equipment

Improve Submission Efficiency – Cont'd

- Facilitate outage creation with a ramp profile
 - For Outage Requests with **Non-Continuous** recurrence:
 - The "Add" button on the Details tab will default the:
 - Period Planned Start to the **prior** Period Planned End
 - Period Planned End to *23:59:00* of the **same day** as the Period Planned Start.

Improve Submission Efficiency – Cont'd

- Facilitate outage creation with a ramp profile
 - For Outage Requests with **Non-Continuous** recurrence:
 - The Constraint Value on the Details tab can be updated in:
 - Final Approved state
 - Implemented state for future periods

Improve Submission Efficiency – Cont'd

- Enhance the **Duplicate** feature
 - Now also duplicates the following fields:
 - Planned Start (overall and period level)
 - Planned End (overall and period level)
 - Constraint Code and Values (overall and period level)
 - Max Recall Time, Unit, and Comments
 - Requested Equipment Description
 - Priority Code
 - Purpose Code

Improve Submission Efficiency – Cont'd

- Conflict Rationale
 - The requirement to provide a Conflict Rationale has been **removed** for the following outage priorities:
 - Forced
 - Forced Extended
 - Urgent

Improve Functionality

- Outage Request Report
 - Now includes the **Constraint Value**
 - Previously, the report would only show the Constraint Abbreviation
 - *DRATE*
 - Now it will also show the Constraint Value
 - *DRATE: 1MW*

Other Enhancements – Cont'd

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Other Enhancements – Cont'd

- Improve Assessment Efficiency:
 - Currently, an outage in the **Negotiate** state will go back to **Study** state upon Commit.
 - Now, from **Negotiate** state it will go to:
 - **Submit** if the Planned Start date is changed to be **outside** the current study period.
 - **Study** if a **significant change** is made to an Advanced Approved outage

NEXT STEPS

Next Steps

- These enhancements will be implemented on September 13, 2017
- Following go-live, there will be no change to how you access the tool or your permissions
- The [User Guide](#) will be updated to reflect the changes at that time

Questions & Answers

