

OUTAGE MANAGEMENT PROCESS REDESIGN

Candida D'Costa

Project SME, IESO

November 19, 2015

Agenda

- Project Progress Update
- CROW (new outage management system) Software Changes
- Revised Data Migration and Process Transition Plan
- Managing Outage Conflicts and Conflict Rationale
- Web Client Testing
- Next Steps

Project Progress Update

- Market Manual development progressing
 - Stakeholder review shifted from Nov 2015 to Feb 2016 (no impact to overall project schedule)
 - Management of outage conflicts still being considered following stakeholder feedback on outage planning guidelines
- Vendor development on track (80% complete)
 - Early release of Web Client now available for testing (more on this later)
 - Final product delivery expected in March 2016
- CROW software changes:
 - Additional flexibility in functionality (discussed next)

Outage Management Software Changes: Additional Flexibility in Functionality

- Changes to actual start and end dates will be permitted under the following outage request statuses:
 - Final Approved
 - Implemented
 - Completed
- To avoid incorrect impact to the Market and scheduling
 - Adjust of incorrect times submitted by the Market Participant
 - Reverse outages inadvertently Completed or Implemented
- Refer to the latest version (v6) of the Requirements Summary Document posted on the stakeholder engagement webpage.

Revised Migration Plan: Outage Requests

- To transfer outages from IOMS to CROW, need logic to derive recurrence from daily and weekend flags:



IOMS Daily flag	IOMS Weekend flag	CROW Recurrence
Continuous	Unavailable	Continuous
Continuous	Available	Return Weekends
Daily	Unavailable	Return Evenings
Daily	Available	Return Evenings and Weekends

Revised Migration Plan: Outage Requests (con't)

- Based on this logic, additional outages will NOT be auto-migrated from IOMS to CROW:
 - IOMS outages with incorrect Daily and Weekend flags:
 - One day outage must be **continuous + available weekends**

Planned Start	Planned End	Daily flag	Weekend flag
Monday 9:00	Monday 5:00	Continuous	Available
		Daily	Unavailable
		Daily	Available
		Continuous	Unavailable



Revised Migration Plan: Outage Requests (con't)

- IOMS outages with incorrect Daily and Weekend flags:
 - Weekday outage must be set as **unavailable weekends**

Planned Start	Planned End	Daily flag	Weekend flag	
Monday	Friday	Daily	Available	X
		Continuous	Available	X

- To avoid the need for resubmission in CROW, going forward Market Participants should follow this guideline when setting outage flags for new outage requests

Revised Process Transition Plan

- Go Live Date revised from Wed Sept 7, 2016 to **Wed Sept 14, 2016**
 - Implications associated with Mon Sept 5 being a holiday
 - Sept 14 aligns with IESO official market facing release date
- No planned outages should be submitted to IOMS between 16:00 **Mon Sept 12, 2016** and 16:00 **Wed Sept 14, 2016**.
- No planned outages should be scheduled to start **Sept 13** through **Sept 15, 2016** or end on Go Live

Revised Process Transition Plan (con't)

- Similar shift to Weekly and 3 Day deadlines as described in the August Stakeholder Engagement
- No impact to Quarterly Process Go-Live date of October 1, 2016
- Official implementation schedule will be provided closer to Go-Live

Proposal for Managing Outage Conflicts and Conflict Rationale

- Risk-based approach to managing conflicts depending on the Advance Approval Process
- Quarterly Process:
 - Greater uncertainty = lower risk tolerance
 - Only non-discretionary rationales accepted
 - e.g. Clearance, Degradation of protection/cooling, Vacuum building outage, etc.
 - Outages left in conflict will be placed 'At-Risk'

Proposal for Managing Outage Conflicts and Conflict Rationale (con't)

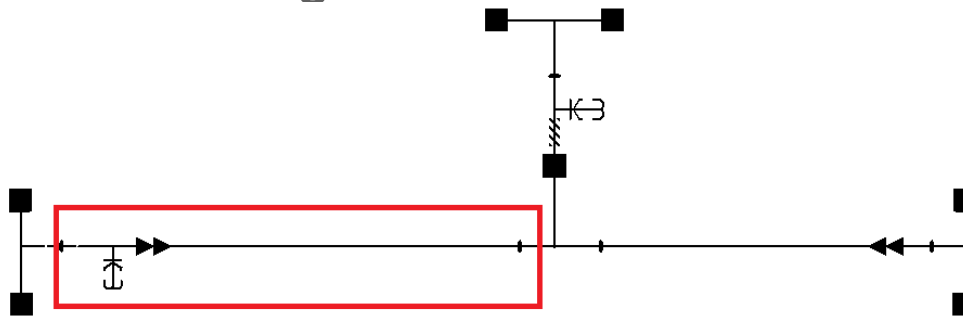
- Weekly/Daily Process:
 - Greater schedule certainty = higher risk tolerance
 - Critical outages required to be submitted
 - Discretionary rationales may be considered, provided there is valid justification (next slide for examples)
 - Assessed on a case by case basis
- Real-time:
 - Conflicts will only be considered for Forced/Urgent outages

Proposal for Managing Outage Conflicts and Conflict Rationale (con't)

- Valid examples of discretionary rationales:
 - **Favourable Ambient Conditions/Short Duration:** the reason for the outage conflict is for thermal concerns, but the outage is scheduled overnight during lower load conditions.
 - **Pre-contingency Control Actions:** transfer load to alleviate thermal concerns or reconfigure transmission system so the contingency sheds load by configuration

Proposal for Managing Outage Conflicts and Conflict Rationale (con't)

- Valid examples of discretionary rationales:
 - **Partial Equipment Outages:** only certain sections of the line are being taken out of service



- **Short Recalls:** for example, conflicts for post-contingency concerns may be resolved by recalling the outage within 15 minutes

Web Client Testing

- Early opportunity for participants to provide feedback on application look and feel
- Volunteers required from various participant classes (i.e. load, generators of different fuel types, transmitters, distributors etc.)
- Half or full day of testing at IESO (Jan 2016)
 - Intro to application
 - Test scenario execution (e.g. create, submit, view outages etc.)
 - Market participant feedback / Q&A
- Register via stakeholder.engagement@ieso.ca by December 4

Next Steps

- Stakeholder Feedback (due Dec 4)
 - CROW Software Changes
 - Revised Data Migration and Process Transition Plan
 - Managing Outage Conflicts and Conflict Rational
 - IESO Response (due Dec 11)

- Next Webinar (Jan/Feb 2016)
 - Overview of revised Market Manuals
 - Results of Web Client testing