

OUTAGE MANAGEMENT PROCESS REDESIGN

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Agenda

- Project Progress Update
- Recap of Web Client Testing
- Proposed Changes to Market Manual 7.3
- Proposed Training Plan for Go Live
- Next Steps

Project Progress Update

- Market Manual development on track
 - Overview of changes (discussed later)
 - Stakeholder review scheduled before market trials (July/August)
- Vendor development nearly complete
 - Factory acceptance testing in mid March, followed by final product delivery
- CROW software changes:
 - Incorporating stakeholder feedback (discussed later)

Recap of Web Client Testing: Testing Process

- 8 Participants:
 - Transmitter, Distributer, Load, Wind/Nuclear/Gas Generator
- Structured and unstructured testing:
 - Submitting outages into different advance approval processes
 - Status transitions (i.e. Submit, Advance Approve, Complete etc.)
 - Making significant/insignificant changes
 - Shifting ramp profiles
 - Duplicating an outage
 - Outage conflict feature
 - Auto approval feature
 - Reports/printing

Recap of Web Client Testing: Summary of Stakeholder Feedback

- Tool Look and Feel
- Defect Identification
- Enhancement Recommendations
- Follow up Questions and Answers

Recap of Web Client Testing: Tool Look and Feel

- Overall, participants found the session helpful in understanding the new processes and features
- Positive feedback on the:
 - Ramp profile shifting capability
 - Tool speed
 - Usability
- Areas for improvement identified under enhancements
 - To be discussed later

Recap of Web Client Testing: Defect Identification

- Inability to modify planned start and end times when successive periods were added to outages with 'Return Evening/Weekend' recurrences
 - 'Add Period' button removed as changing the planned end time at the outage request level will auto-create successive periods.
- FAA flag not set when requirements were met
- Revoked outage set as "Rejected" in details tab
- After outage submission error, some data is erased (purpose code, description)

Recap of Web Client Testing: Defect Identification (cont'd)

- Voltage class filtering did not display low voltage equipment
- Outages could not be 'Committed' from the Negotiate state after adding equipment
- Outage request form template display issues
 - Internet browser issue
- Browser history allows a user to re-enter a previously logged out profile without logging in again

Recap of Web Client Testing: Enhancements to be Implemented before Go Live

- Company list in the equipment search function will be alphabetised
- Recalled outages will have their actual end time set as the recall time
- Actual start and end times will be added to the outage request report
- 'Complete' action name changed to 'Complete Outage'

Recap of Web Client Testing: Potential Future Enhancements

- Identify when 'Equipment Description' field is mandatory
- Move 'Conflict Rationale' field to summary tab
- Visual identification of missing mandatory fields
- Add 'Refresh' button to the outage request
- Identify when an outage goes into the Quarterly process

Recap of Web Client Testing: Potential Future Enhancements (cont'd)

- Mouse-over acronym definitions
- Speed up equipment entry (e.g. default equipment search filters to previously selected Companies and Stations)
- Default the planned start time to the start of the next applicable coverage period (i.e. 1 Day, 3 Day or Weekly)

Recap of Web Client Testing: Questions and Answers

- When will training occur and can a test system be rolled out to market participant employees?
 - *To be considered as part of training plan (discussed next)*
- Will the platform still be Portal?
 - *Yes*
- How long will outages be retained in the web client?
 - *7 years*

Recap of Web Client Testing: Questions and Answers (cont'd)

- Why must an outage first be submitted in order for 'Check Conflict' action to work?
 - *Outages must be saved to the database for conflict checking to work*
 - *Potential future enhancement*
- Why are changes to 'Equipment Description' considered a significant change (i.e. priority date change)?
 - *Equipment description could change the entire nature of the outage request (e.g. "A protection" could change to "A and B protection")*

Changes to Market Manual 7.3

- Restructured manual for clarity and chronology
- Incorporated new market rule requirements, tool features and language
- Streamlined instructions by:
 - Adding examples and images
 - Removing redundant content

Changes to Market Manual 7.3 (cont'd)

Section 1: Introduction

Updated for clarity and conciseness:

- *Purpose, Overview, Roles and responsibilities, Confidentiality and Contact Information*

Section 2: Outage Management Overview

Describes scope and timelines of outage requests:

- *Equipment criticality, purpose codes, constraint codes and priority codes*
- *Submission and approval deadlines*

Changes to Market Manual 7.3 (cont'd)

Section 3: Outage Reporting Requirements

Restructured for clarity:

- Grouped by participant type: Generators, Loads, All
- 'If-Then' statements, examples and images
- Deleted duplication

Section 4: Procedural Workflow

Depicts outage management in chronological order:

- Facility Assessment → Outage Planning →
Outage Submission → Outage Assessment →
Outage Implementation → Outage Compensation

Changes to Market Manual 7.3 (cont'd)

Section 5: Replacement Energy to Support Planned Outages

Updated for clarity:

- Timelines for notification and confirmation of purchase of replacement energy
- Example explaining the IESO's assessment based on priority date

Proposed Training Plan for Go Live: Approach

- Stakeholder Engagement will remain active:
 - Review of Market Manuals and Training Materials
 - Market Trial Preparation and Execution
- Broader outreach required as Go Live approaches
 - Approximately 200 market participants report outages
- Focus and frequency increases as Go Live approaches

Proposed Training Plan for Go Live: Training Materials

- IESO Training Page
 - Quick Take (i.e. what's changed document)
 - CROW User Guide & 'How To' Video Clips
- Stakeholder Engagement Page
 - Market Trial Materials
- Weekly Bulletin / Email Communications
 - Progress Updates and Training Notices

Proposed Training Plan for Go Live: Training Materials (cont'd)

- Web Client Access
 - Market Participant Familiarity
 - Logistics and timing still under consideration
- Training Sessions (Face to Face / Webex)
 - Market Trials and Go Live Readiness
 - Review of process and tool changes
 - Market Trial training limited to test group volunteers
 - Go Live training applicable to all participants

Proposed Training Plan for Go Live: Training Schedule



Next Steps

- Stakeholder Feedback (due March 4)
 - Outcomes of Web Client Testing
 - Market Manual Changes
 - Proposed Training Plan
- IESO Response (due March 11)
- Next Webinar (TBD)