Equipment Registration Specialist
Equipment Outage Submitter/Viewer/Late
Notification Contact Roles

A. Equipment Registration Specialist

Each organization that is authorized as an equipment Owner must have at least one Equipment Registration Specialist registered with the IESO. This role needs to be added in Online IESO by an Applicant Representative registered for your organization.

Responsibilities

- Submit registration requests for facilities, equipment and resources.
- Submit equipment details.
- Submit resource details and relationships.
- Submit supporting documentation.
- Accept telemetry and commissioning requirements.

Complete Assigned Tasks:
Equipment Registration Specialists will receive tasks to submit equipment and resource information. The tasks are for "Manage Facility and Equipment" and "Manage Resource" requests that you initiated. Notifications will be sent out when tasks are assigned to your organization.

All tasks will be displayed on the "Tasks" page in Online IESO with the associated request number. You must accept that task you wish to complete by clicking on the task. The task will then be removed from your group of Equipment Registration Specialists (if more than one are registered for your organization) and will be assigned to you only. Tasks that include submissions to IESO for review may be rejected and re-sent to you to make changes to your submission.

Equipment Registration Specialists can also perform the following in Online IESO:

Export Outage Management Attributes
This will allow you to export a file that contains Outage Management Attributes for the selected equipment, such as the Outage Reporting Required Flag and Outage Criticality Level.

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Instructions:

Click on "Records" and select "Equipment and Resourced by Facility".

Select a Facility.

Select "Export Equipment and Resources Data".

Follow the on-screen instructions to export equipment and resource data.

Create or Edit Control Centre

Control centres represent the location of an organization's real-time operations. This facilitates the submission of outages that are not associated to a particular station, e.g. SCADA systems. A control centre can be associated to a control centre section through the "Update Section" request type under "Update Organization".

Instructions:

In the "Action" tab, select "Update Organization".

Select "Manage Control Centre".

Follow the on-screen instructions.

Create or Edit Third Party Viewership

This allows you to share outage information with other market participants by granting third party viewership of your equipment. After creating a Third Party Viewership group, the selected organization(s) will be able to view outage details for the selected equipment in the Outage Management System. A single outage request may contain both, equipment with and without third party viewership access. In such cases, third party viewers will only see the equipment to which they have access.

Instructions:

1. Under the "Actions" tab, initiate action "Manage Third Party Viewership"

    Manage Third Party Viewership ☆
    Assign viewership of equipment outage details to other organizations.

2. Select the Organization to represent for this request and click "Next".

3. A list will be presented displaying equipment and resources with Third Party Viewership currently assigned (if any).

Third Party Viewership

The list below shows all existing and new Third party viewership assignment(s). You can use the fields below to filter the displayed data in the list.

Request Details

Organization	Request Number
TEST ORGANIZATION 1	72

Third party viewership assignment(s)

Equipment / Resource Name

Facility

Type

Viewer Organization

Clear   Filter

☐	Equipment / Resource ↑	Type	Facility	Viewership All	Viewer Organization
			No items available		

Remove Assignment(s)   Mark as Viewership All

Add New third party viewership assignment(s)

To Add new third party viewership assignment, please click 'Add New Assignment'. In the next screen, you will be able to select equipment and/or resource(s) from different facilities and assign them viewer organization or mark them for viewership All.

Add New Assignment

Save Changes

After finishing all changes with third party viewership, you need to click 'Confirm Changes' to see your modifications in the next screen and confirm them.

Exit   Confirm Changes

4. To add a new Third Party Viewership assignment click the green "**Add New Assignment**" Button (highlighted above).

5. Select facility from the drop-down list and the available equipment and resources will be displayed for selection.

6. Select the equipment and resources to assign Third Party Viewership assignments to and click the "Select" button (highlighted below).

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Add third Party Viewership

Request Details

Organization
TEST ORGANIZATION 1

Request Number
72

Third party viewership assignment(s)

Facility

KOSA CANADA KINGSTON CTS

Select a facility to see the related equipment / resource(s). Use the fields below to filter the displayed data in the list. If no equipment or resource available for selection, the facility will not show up in the list.

Select Equipment / Resource to add to third party viewership assignment

Equipment / Resource Name

Type

Clear   Filter

Note: Only equipment / Resource flagged as 'Outage Reporting Required' and eligible for third party viewership selection ,Equipment / Resource with less than 4 viewership assignment or not marked as viewership all, will be available for selection. Select check all required items and then click select

	Name	Type
☑	QA_CIRCTEST	Circuit
☑	QA_OCS1	Overhead Circuit Section
☐	QABUS_DEC16	Bus
☐	QA_WT_TEST	Wind Turbine Generator
☐	QA_genRes1	GEN Resource
☐	QA_SM	Synchronous Machine

⏮ ◀ 1-6 of 6 ▶ ⏭

Select

Back

Mark as Viewership All   Add Third Party Assignment

7. You now have two options:

   a) You can "Add Third Party Assignment" or
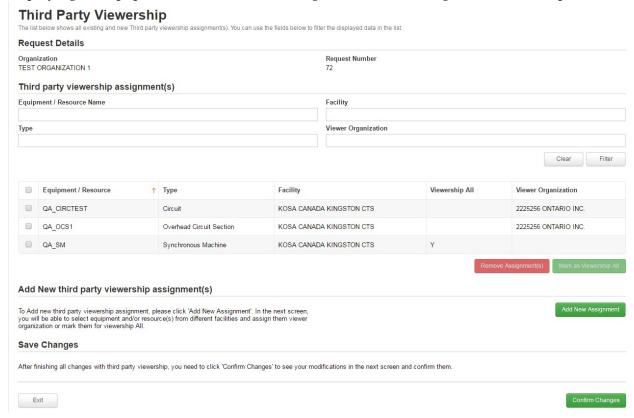   b) You can "Mark as Viewership All"

   The first option, "**Add Third Party Assignment**" lets you select a specific company from a drop down list to have viewership access over the selected equipment or resources. The "**Mark as Viewership All**" option makes the equipment or resource visible to all organizations.

   Note: If you assign a piece of equipment as "Viewership All", previously created Third Party Viewership groups for that equipment will be deleted and all market participants who have access to the Outage Management System will be able to see outage details for that equipment.

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Selected Item(s)	
Name	**Type**
QA_CIRCTEST	Circuit
QA_OCS1	Overhead Circuit Section

Clear Selection

Select Viewer Organization

--- Select an Organization ---

Please select the third party viewer organization. If your selected equipment list contains an equipment with previously viewer organization as the selected one, the relationship will not be added again.

Back   Mark as Viewership All   Add Third Party Assignment
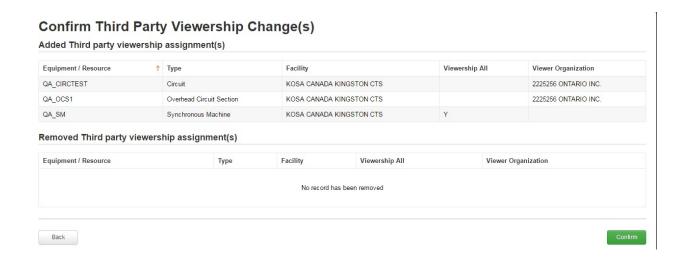
8. After completing step 7, you will return to the main Third Party Viewership screen displaying the equipment/resources and the organization that was granted viewership.

Third Party Viewership

The list below shows all existing and new Third party viewership assignment(s). You can use the fields below to filter the displayed data in the list.

Request Details

Organization
TEST ORGANIZATION 1

Request Number
72

Third party viewership assignment(s)

Equipment / Resource Name

Facility

Type

Viewer Organization

Clear   Filter

	Equipment / Resource ↑	Type	Facility	Viewership All	Viewer Organization
☐	QA_CIRCTEST	Circuit	KOSA CANADA KINGSTON CTS		2225256 ONTARIO INC.
☐	QA_OCS1	Overhead Circuit Section	KOSA CANADA KINGSTON CTS		2225256 ONTARIO INC.
☐	QA_SM	Synchronous Machine	KOSA CANADA KINGSTON CTS	Y	

Remove Assignment(s)   Mark as Viewership All

Add New third party viewership assignment(s)

To Add new third party viewership assignment, please click 'Add New Assignment'. In the next screen, you will be able to select equipment and/or resource(s) from different facilities and assign them viewer organization or mark them for viewership All.

Add New Assignment

Save Changes

After finishing all changes with third party viewership, you need to click 'Confirm Changes' to see your modifications in the next screen and confirm them.

Exit   Confirm Changes

9. Click "Confirm Changes" to proceed to the review screen. The next screen will display any new viewerships added as well as any that were removed.

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Confirm Third Party Viewership Change(s)

Added Third party viewership assignment(s)

Equipment / Resource ↑	Type	Facility	Viewership All	Viewer Organization
QA_CIRCTEST	Circuit	KOSA CANADA KINGSTON CTS		2225256 ONTARIO INC.
QA_OCS1	Overhead Circuit Section	KOSA CANADA KINGSTON CTS		2225256 ONTARIO INC.
QA_SM	Synchronous Machine	KOSA CANADA KINGSTON CTS	Y	

Removed Third party viewership assignment(s)

Equipment / Resource	Type	Facility	Viewership All	Viewer Organization
			No record has been removed	

Back | Confirm

10. Click on the "Confirm" button to complete the request.

B. Equipment Outage Submitter

Each organization that is authorized as an equipment Operator must have at least one Equipment Outage Submitter registered with the IESO. This role needs to be added in Online IESO by an Applicant Representative registered for your organization.

The Equipment Outage Submitter is responsible for submitting, updating and cancelling outage requests on equipment operated by your organization through the IESO`s Outage Management System. This contact role can also view outages.

C. Equipment Outage Viewer

This role needs to be added in Online IESO by an Applicant Representative registered for your organization.

The Equipment Outage Viewer can only view outages submitted by the Equipment Outage Submitter in the Outage Management System. This is mutually exclusive with the Equipment Outage Submitter role, i.e. an individual should only be assigned one of these roles.

D. Equipment Outage Late Notification Contact

This role needs to be added in Online IESO by an Applicant Representative registered for your organization.

The Equipment Outage Late Notification Contact will receive e-mail notification on outages that are late to start and are responsible for taken appropriate action. This role is not mandatory,

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since this is meant just to facilitate the process; it is still the responsibility of the organization to monitor this independently.

Information about Online IESO is available at Online IESO For more information, contact IESO Customer Relations:
Tel: 1.888.448.7777
Email: customer.relations@ieso.ca