eNAMS User Guide

OCLRs - Operational Capability Limit Records

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nationalgridESO

Contents

Introduction

eNAMS provides OCLR functionality including:

- OCL Enhancement Requests from the ESO to the TO/OFTOs

- OCLRs raised by the TO/OFTOs for OCL enhancements or reductions, and their acknowledgement by the ESO

- Cloning an OCLR from a previous OCLR

- Reporting on OCLRs

There are 2 types of Operational Capability Limit (OCL). Both are effectively a change request, usually submitted by the TO Outage Planner (though an ESO can also raise them to record agreements made offline from eNAMS e.g. where a TO/OFTO does not use eNAMS to exchange OCLR information with the ESO):

- Any service **Reduction** to a TOs Transmission services
- Any **Enhancement** to the OCLs made available by the TO or requested by the ESO.

If a piece of equipment is working more or less efficiently than before, create a **Technical Limitation** - e.g. where you have an isolator that is now hand operation only rather than via telecommand, or vice versa.

Where you are changing equipment operation level e.g. from 100 to 95 Megawatts, or vice versa, this is classed as a **Ratings Change**.

For further detail on the above, consult STCP 04-4 and your internal procedures.

OCLs need to be factored in when scheduling Outages etc. OCLRs are done at substation level.

You can use the **Recently Viewed** filter box top left to view existing OCLRs by type and status:
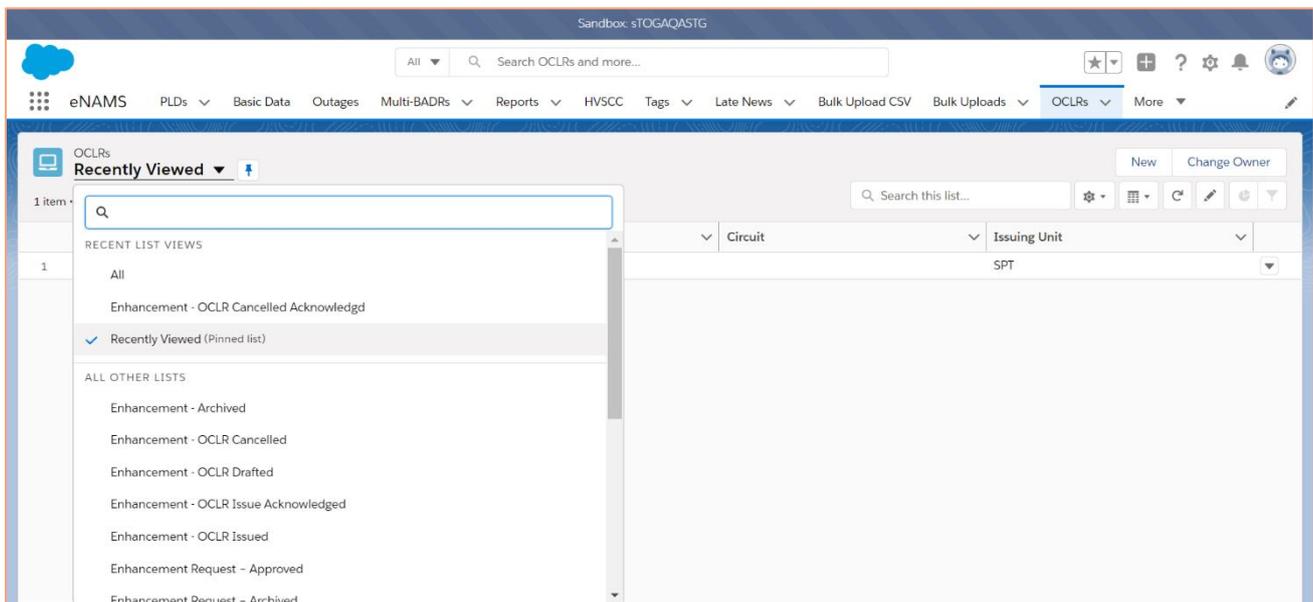
OCL Enhancement Request through to OCLR Enhancement

Log in as an ESO:

1. At the top right of the OCLR screen, click the **New** button
2. From the dialog box, select the relevant option:

New OCLR

Select a record type
- ◉ OCL Enhancement Request
- ○ OCLR Enhancement
- ○ OCLR Reduction

Cancel   Next

3. Select an **OCL Enhancement Request**, *this is an extra step performed by the ESO to ask the TO for an Enhancement – a TO can just create one as an OCLR Enhancement* – click **Next**
4. Complete the **Issuing Unit (e.g. NGET**, **SPT** or **SHETL)**, **OR** select **Other Issuing Unit** (if this is for an OFTO) – you can't select both, but you must select one or the other
5. Type in the **Circuit** (e.g. **B38G Creyke Beck – Hedon**) and select the **Plant Group** that the Circuit comes under (e.g. **Overhead Line**)

New OCLR: OCL Enhancement Request

Details

Issuing Unit
NGET

* Status
OCL Enhancement Request Drafted

Other Issuing Unit
Search Accounts...

Request Another TO/OFTO ⓘ

Request to Remove Another TO/OFTO ⓘ

OFTO Code ⓘ

Circuit / Equipment Information (Substations below)

Circuit
B38G Creyke Beck – Hedon

Plant Group
Overhead Line

Outage
Search Outages...

Cancel   Save & New   Save

6. Complete the **OCLR Start/End Date and Time** – when the Enhancement will be in effect
7. Complete **Enhancement Request Rating Information**, and **Reason for OCL Enhancement Request**

8. **OCL Enhancement Requested By** and **Date and Time** auto complete with your details when you save, *or you can complete these fields if you submit the request on behalf of someone else*:

9. Click **Save** and the **OCL Enhancement Request** is created, showing the statuses at the top, from "OCL Enhancement Request Drafted" to "Rejected OCL Enhancement Request Archived":

10. **Before submitting to the TO, you need to add at least 1 Substation – you get an error if you don't** – scroll to the bottom (can also upload files if required) and click the button **Add Substations**:

11. At **Substation Code**, enter a relevant substation code name and click **Search Substations**:

12. Tick the relevant substation and click **Add Substations**:

13. Click **Add Substations** again and enter a code for the other substation involved, click **Search Substations**

14. Tick the second relevant substation and click **Add Substations**. Both substations are displayed in the OCLR Substations area of the screen:

15. Click the button **Submit OCL Enhancement** top right.

NOTE: There is no validation on the substations added.

16. Scroll back to the top of the screen - the status at the top of the screen has moved to **OCL Enhancement Request Submitted**:
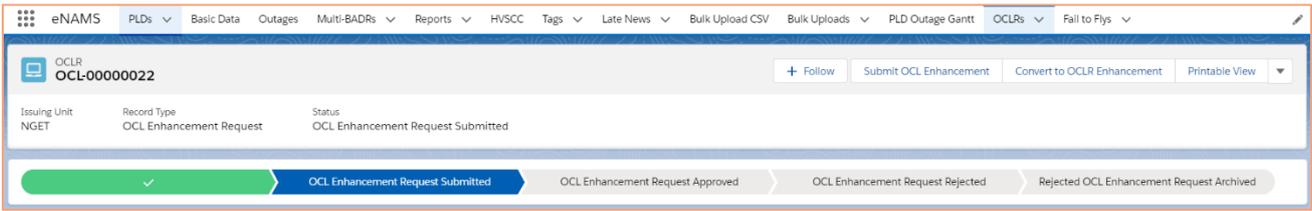
17. Go to the **OCLR** tab - from the **Recently Viewed** filter, select **Enhancement Request – Submitted**:
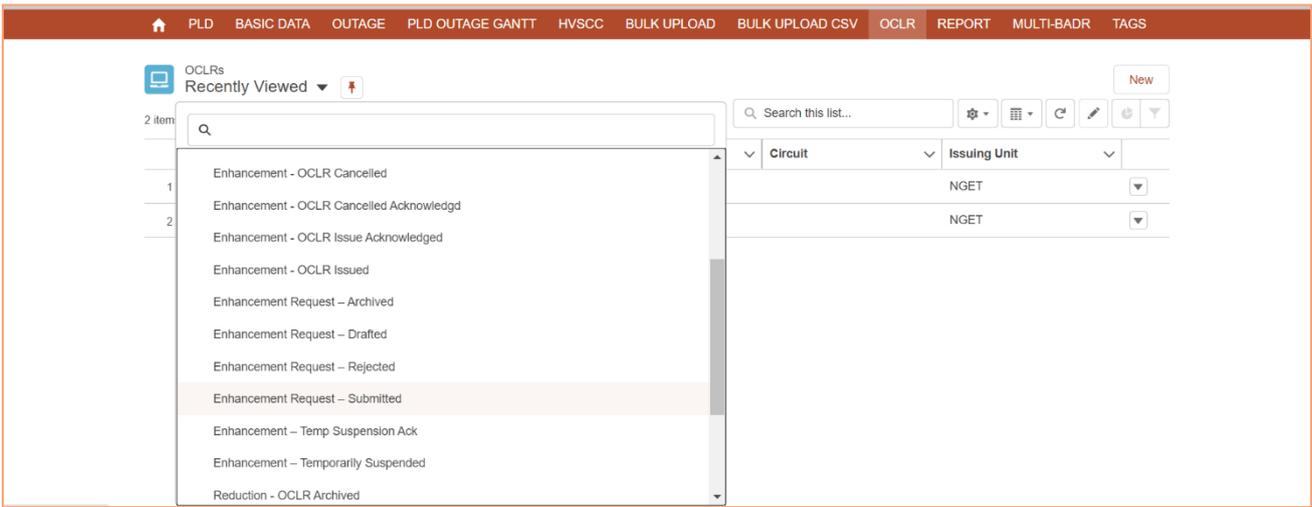
18. Click the submitted OCL Enhancement Request **Name** to open it:
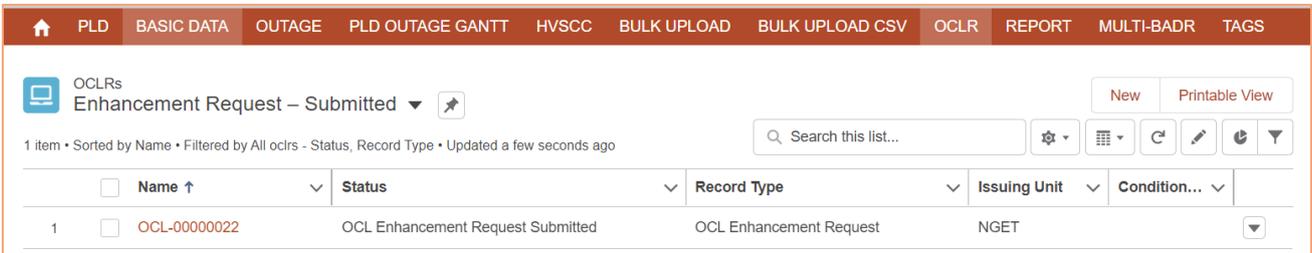
19. Scroll down and click the ✏ to enter **TO Approval Comments**:
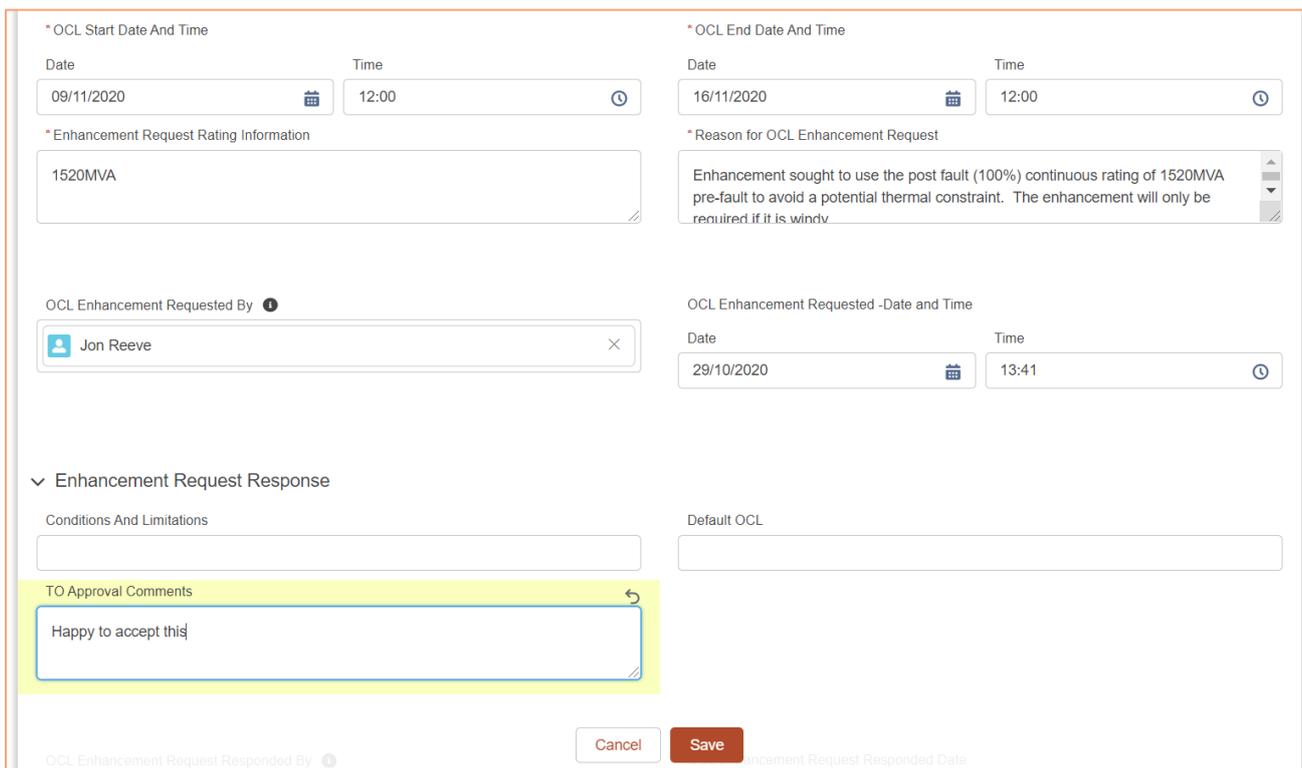
* OCL Start Date And Time		* OCL End Date And Time	
Date	Time	Date	Time
09/11/2020 🗓	12:00 🕐	16/11/2020 🗓	12:00 🕐

* Enhancement Request Rating Information

1520MVA

* Reason for OCL Enhancement Request

Enhancement sought to use the post fault (100%) continuous rating of 1520MVA pre-fault to avoid a potential thermal constraint. The enhancement will only be required if it is windy.

OCL Enhancement Requested By ⓘ

👤 Jon Reeve ✕

OCL Enhancement Requested -Date and Time

Date	Time
29/10/2020 🗓	13:41 🕐

∨ Enhancement Request Response

Conditions And Limitations

Default OCL

TO Approval Comments ↩

Happy to accept this

Cancel Save

OCL Enhancement Request Responded By ⓘ nhancement Request Responded Date

20. You can add more substations/attach files if required; prior to approving the OCLR, you need to click ✏ to edit complete the field **Conditions and Limitations** or you will get an error, then click **Save**:
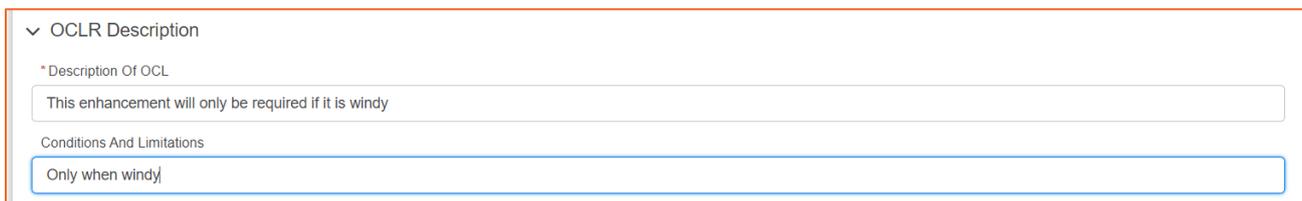
∨ OCLR Description

* Description Of OCL

This enhancement will only be required if it is windy

Conditions And Limitations

Only when windy

21. Scroll up and edit the **Status** at the top right from **OCL Enhancement Request Submitted** to **OCL Enhancement Request Approved** (you can also reject if appropriate) then click **Save**:
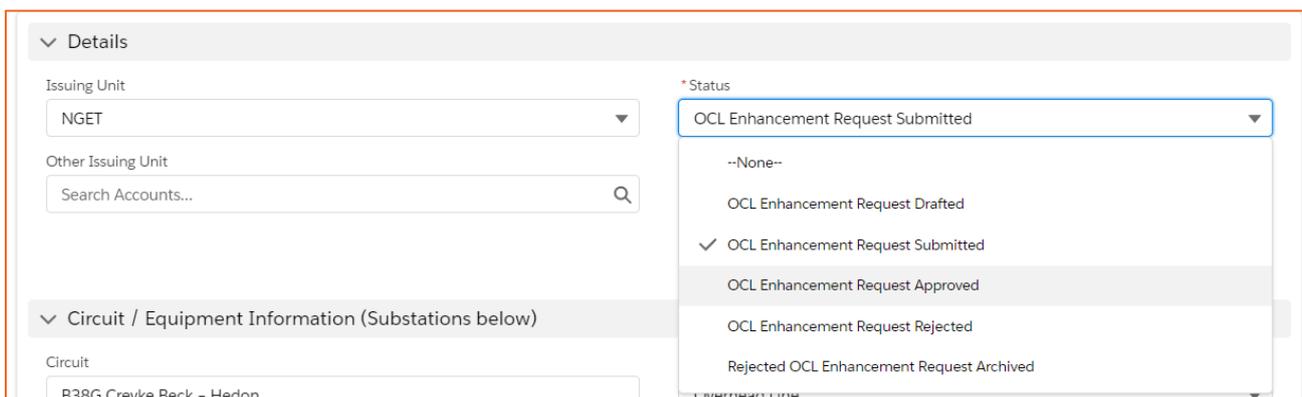
∨ Details

Issuing Unit

NGET ▼

Other Issuing Unit

Search Accounts... 🔍

∨ Circuit / Equipment Information (Substations below)

Circuit

B38G Crevke Beck – Hedon

* Status

OCL Enhancement Request Submitted ▼

--None--

OCL Enhancement Request Drafted

✓ OCL Enhancement Request Submitted

OCL Enhancement Request Approved

OCL Enhancement Request Rejected

Rejected OCL Enhancement Request Archived

Overhead Line

22. Next, convert the request to an actual enhancement – click the button at the top right of the screen **Convert to OCLR Enhancement** (you can only do this when the request is at "Approved" status):

Convert to OCLR Enhancement

23. A form appears, largely completed; you need to input **OCLR Number** 5-digit number that the TO provides (e.g. **47318**) – the field is limited to 5 numbers and checks for duplicates - and **OCLR Number Year** – 2 digits (e.g. **20**) *e.g. the Full OCLR number could be B47418/20, or for an OFTO, could begin with **FTWA**, where the F denotes offshore, and TWA the OFTO code*:

NGET	▼

Other Issuing Unit

Search Accounts...	🔍

* OCL Start Date And Time

Date

09-Nov-2020	📅

Time

12:00	🕐

* OCL End Date And Time

Date

16-Nov-2020	📅

Time

12:00	🕐

Plant Group

Overhead Line	▼

Circuit

B38G Creyke Beck – Hedon

* OCLR Number

33447

* OCLR Number Year

20

Conditions And Limitations

Only when windy

24. There are various other fields, the only other mandatory one is **Description of OCL** – this is deliberately not pulled in from the Description entered by the ESO to prompt the TO to add more information:

New Pre-Fault Continuous Rating

New Post-Fault Continuous Rating

New Post-Fault Continuous Rating

* Description Of OCL

This enhancement will only be required if it is windy

OCL Enhancement Temp Suspension Start

Date

	📅

Time

	🕐

OCL Enhancement Temp Suspension End

Date

	📅

Time

	🕐

OCL Enhancement Temp Suspended By ⓘ

Search People...	🔍

Update

25. Scroll down and click the button **Update** in the bottom left. This takes you to the OCLR screen – the Full OCLR Number is generated, made up of the number prefix, e.g. B for NGET, 5-digit OCLR number assigned above, and the OCLR number year, or for an OFTO, could begin with **FTWA**, where the F denotes offshore, and TWA the OFTO code.

26. You may need to press **F5** on the keyboard to refresh the screen; click ✏ to edit the field **Operational Effect** – and select either:
    a. **Technical Limitation** – technical problem or change to the way equipment is operated
    b. **Rating Change** – changing the rating of equipment – e.g. from 1500 to 1550 MVA:
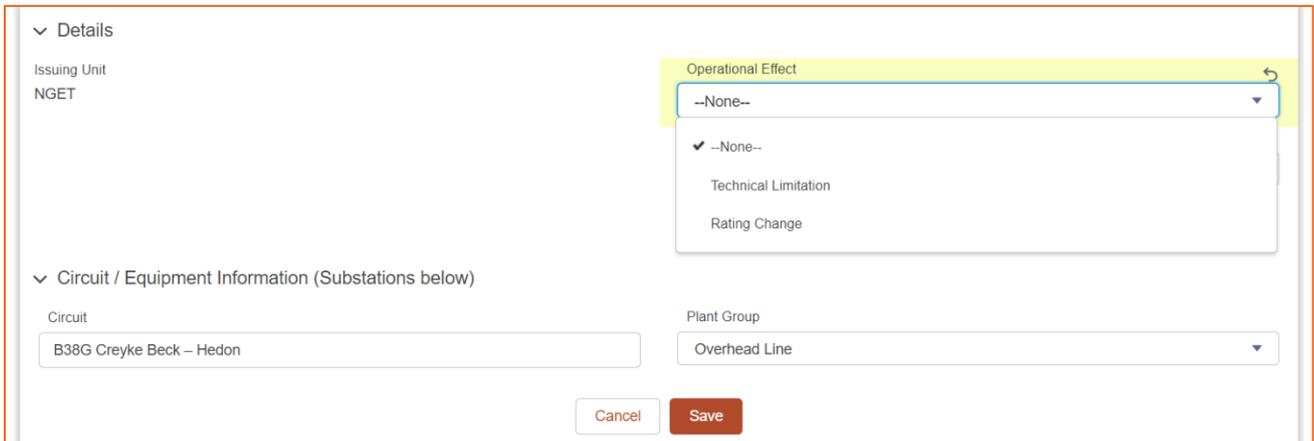
27. Various other fields, none are mandatory, click **Save**
28. The OCLR is now in **OCLR Drafted** status – edit the **Status** field and select **OCLR Issued** then **Save**;
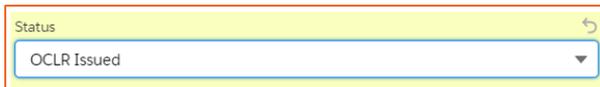
   scroll down to **Issue Details** – the date/time and your user ID are auto-populated.

Log in as ESO:

29. Open **OCLRs**, find your OCLR using filter **Enhancement – OCLR Issued** top left if necessary – it has now become an **OCLR Enhancement** (see **Record Type** at the top) at the status **OCLR Issued**:
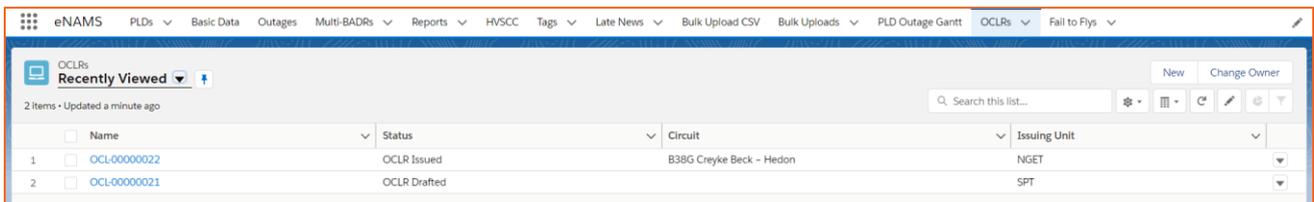
30. Open the OCLR; you can scroll down and record details of users affected by the OCLR – under **Affected Users**, click **New**:
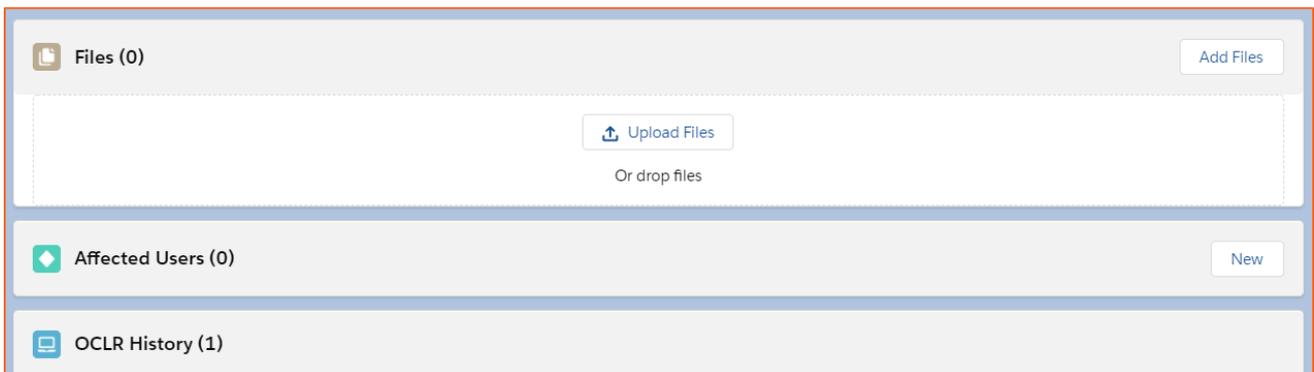
31. Select whether the users will be affected by either the OCLR or by Outages – in this case we will select **OCLR Affected User** and click **Next**:

32. Click in the **Account** field, type the first 2 letters of the account – account names are currently:
    - Scottish Hydro Electric transmission Limited
    - National Grid Electricity Transmission PLC
    - SP Transmission PLC
    then click **Show All Results for…**:

33. Select the relevant account at the next screen:

34. Click the **Save** button – your Affected User is added to the OCLR – you could click **New** again to add more if required:

35. Click ✏ to change the **Status** to **OCLR Issue Acknowledged** and **Save**:
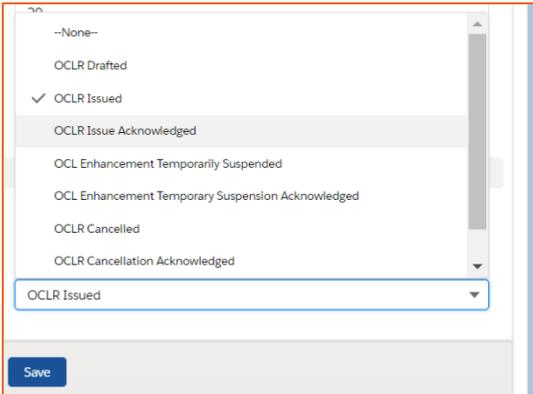
NOTE: There are other statuses, e.g. **Suspended** that could be selected if the OCLR needs to be postponed, e.g. due to a thermal constraint that is not relevant in Summer.

This would be initiated by the TO, who would change the **Status** to **OCLR Enhancement Temporarily Suspended**. On hitting **Save**, they would be prompted to complete Suspension Details fields: Start/End Dates/Times and Reason. Hit **Save** once these fields are completed.

The ESO would then update the **Status** field to **OCLR Enhancement Temporary Suspension Acknowledged** and **Save**.

Once the OCLR is no longer required, the TO sets the **Status** to **OCLR Cancelled**.

ESO then sets the **Status** to **OCLR Cancellation Acknowledged** and clicks **Save**.

Finally, the OCLR can be archived via the Status field to remove it from the "Cancelled" view.

Enhancement

The TO Outage Planner can also raise an Enhancement, as described below.

<mark>**Log in as TOOP (OR AS AN ESO):**</mark>

1. Click **OCLR** at the Navigation bar, then at the top right of the OCLR screen, click the **New** button:

New

2. Select **OCLR Enhancement** then **Next**:

New OCLR

Select a record type
- OCLR Enhancement
- OCLR Reduction

Cancel | Next

3. Enter **OCLR Number**; 5-digit number that TO provides; the field is limited to 5 numbers and checks for duplicates, then **OCLR Number Year** – 2 digits *e.g. the Full OCLR number could be B47318/20, or for an OFTO, could begin with **FTWA**, where the F denotes offshore, and TWA the OFTO code*

4. Click into **Operational Effect** and select **Technical Limitation** or **Rating Change** then scroll down:

New OCLR: OCLR Enhancement

OCLR Number Details

Full OCLR Number | * OCLR Number Year
21

* OCLR Number | OCLR Number Prefix
98532

Request Another TO/OFTO

Request to Remove Another TO/OFTO

OFTO Code

Details

Operational Effect
Rating Change
Status

Cancel | Save

5. At **Circuit**, input description of circuit affected, e.g. **REDBRIDGE-TOTTENHAM 1 275kV**
6. Select **Plant Group**, e.g. **Overhead Line**

7. Set **OCL Start/End Date/Time**:

8. Scroll down; and set the **OCLR Indicative Duration** e.g. to **Next Outage**:

9. Scroll down and add **Description of OCL**, **Conditions And Limitations** if required and click **Save**:

10. The OCLR is in **OCLR Drafted** status – **before submitting, you need to now add at least 1 Substation – you get an error if you don't** – scroll down to the bottom (you can also upload files if required) and click the button **Add Substations**:

11. At **Substation Code**, enter relevant substation code names, e.g. **REDB2** for Redbridge and click **Search Substations**:

12. Tick the relevant substation (repeat as necessary for other affected substations) and click **Add Substations** – repeat for each substation you are adding:

The substation is displayed in the OCLR Substations area of the screen.

13. Edit the **Status** field and select **OCLR Issued** then **Save** – scroll down to **Issue Details** – the date/time and your user ID are auto-populated:

14. At **OCLR**, from the **filter** top left, select **Enhancement – OCLR Issued** and open your OCLR:

	Name ↑	Full OCLR Number	Status	Record Type	Issuing Unit	Conditions And Limitatio...	
1	OCL-00000010	C77756/20	OCLR Issued	OCLR Enhancement	SPT	test	▾
2	OCL-00000011	D56464/20	OCLR Issued	OCLR Enhancement	SHETL	ytr	▾
3	OCL-00000025	C97322/20	OCLR Issued	OCLR Enhancement Issued	SPT		▾
4	OCL-00000027	65456/20	OCLR Issued	OCLR Enhancement Issued		hjg	▾
5	OCL-00000031	C67890/20	OCLR Issued	OCLR Enhancement Issued	SPT		▾
6	OCL-00000032	B22993/20	OCLR Issued	OCLR Enhancement Issued	NGET	Only when windy	▾
7	OCL-00000077	B98532/21	OCLR Issued	OCLR Enhancement Issued	NGET	N/A	▾

15. Change Status to **OCLR Issue Acknowledged** and **Save**:

Status
OCLR Issue Acknowledged

Cancel   Save

16. Scroll down to **Issue Details** – the OCLR is date, time and name stamped with your details:

OCLR
OCL-00000077

⌄ Issue Details

OCLR Issued - Date And Time	OCLR Issued - By On Behalf of TO/OFTO
26/03/2021 13:36	Jon Reeve NGET OP
OCLR Issue Acknowledged - Date and Time	OCLR Issue Acknowledged on behalf of ESO
26/03/2021 13:47	Jon Reeve NGET OP

17. Once the OCLR is no longer required, open it, change the status to **OCLR Cancelled** and **Save**:

18. Open the OCLR, change OCLR status to **OCLR Cancellation Acknowledged** and **Save**:

19. Scroll down and you'll see the **Cancellation Details** have been populated:

20. If you need to add actions off the back of the OCLR, these can be recorded in the section **Actions and Audit (ESO Internal)** under **Actions and Updates**:

Reduction

1. Click **OCLR** at the Navigation bar, then at the top right of the OCLR screen, click the **New** button:

2. Select **OCLR Reduction** then **Next**:

3. Enter **OCLR Number**; 5-digit number that TO provides; the field is limited to 5 numbers and checks for duplicates, then **OCLR Number Year** – 2 digits *e.g. the Full OCLR number could be B47318/20, or for an OFTO, could begin with FTWA, where the F denotes offshore, and TWA the OFTO code*
4. Click into **Operational Effect** and select **Technical Limitation** or **Rating Change** then scroll down:

5. At **Circuit**, input description of circuit affected, e.g. **REDBRIDGE-TOTTENHAM 1 275kV**
6. Select **Plant Group**, e.g. **Overhead Line**

7. Set **OCL Start/End Date/Time**:

8. Scroll down; and set the **OCLR Indicative Duration** e.g. to **Next Outage**:

9. Scroll down and complete **Description of OCL**, **Conditions And Limitations** and click **Save**:

NOTE: There is no "suspension" process with a reduction.

10. The OCLR is in **OCLR Drafted** status – **before submitting, you need to now add at least 1 Substation – you get an error if you don't** – scroll down to the bottom (you can also upload files if required) and click the button **Add Substations**:

11. At **Substation Code**, enter relevant substation code names, e.g. **REDB2** for Redbridge and click **Search Substations**:

12. Tick the relevant substation (repeat as necessary for other affected substations) and click **Add Substations** – repeat for each substation you are adding:

The substation is displayed in the OCLR Substations area of the screen.

13. Edit the **Status** field and select **OCLR Issued** then **Save** – scroll down to **Issue Details** – the date/time and your user ID are auto-populated:

14. At **OCLR**, from the **filter** drop-down top left, select **Reduction – OCLR Issued** and open your OCLR:

15. Change Status to **OCLR Issue Acknowledged** and **Save**:

16. Scroll down to **Issue Details** – the OCLR is date, time and name stamped with your details:

Log in as TOOP:

17. Once the OCLR is no longer required, open it, change the status to **OCLR Cancelled** and **Save**:

18. Open the OCLR, change OCLR status to **OCLR Cancellation Acknowledged** and **Save**:

19. Scroll down and you'll see the **Cancellation Details** have been populated:

20. If you need to add actions off the back of the OCLR, these can be recorded in the section **Actions and Audit (ESO Internal)** under **Actions and Updates**:

Clone OCLR

If you need to create an OCLR that is similar to an existing one, use the **Clone OCLR** button as a time saver. This can be used on an OCLR at any workflow status.

1. Open an existing OCLR similar to the one you need to create

2. At the top right of the OCLR screen, click the **Clone OCLR** button:
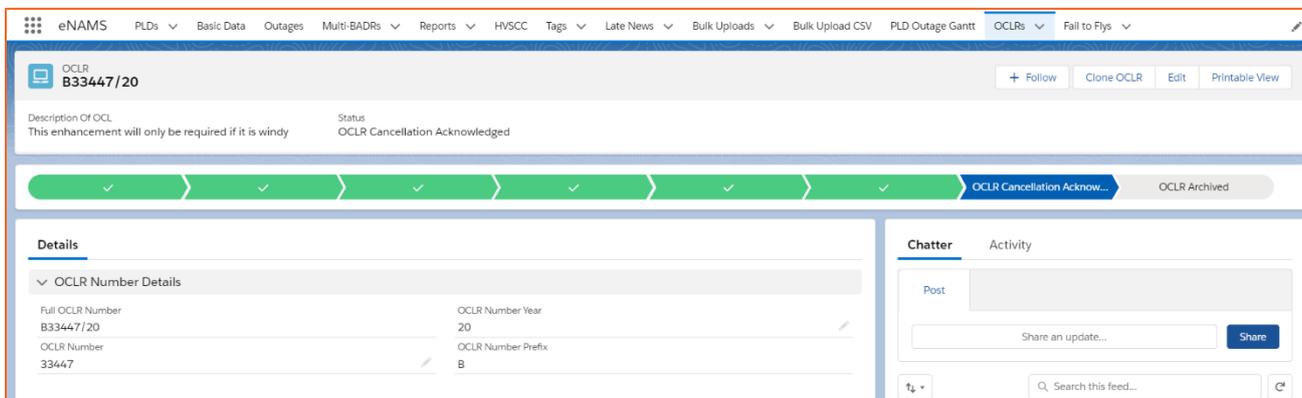
3. You are presented with a form – most of the fields are completed with the existing OCLR information – add a new **OCLR Number** as shown below:
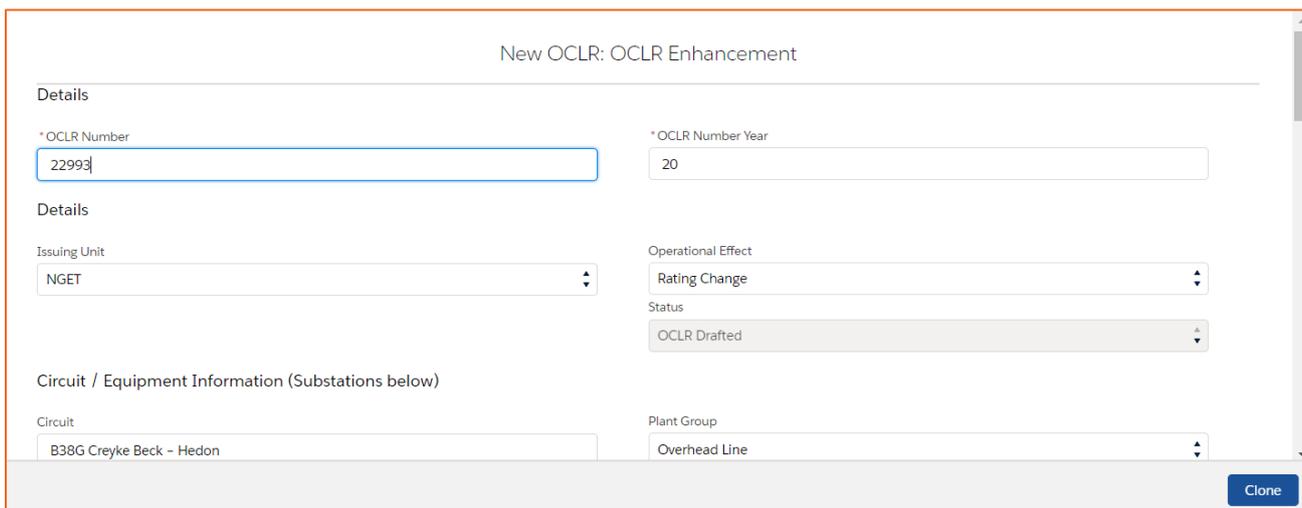
4. Scroll down and input **OCL Start/End Date And Time** for your new OCLR then click **Clone**:
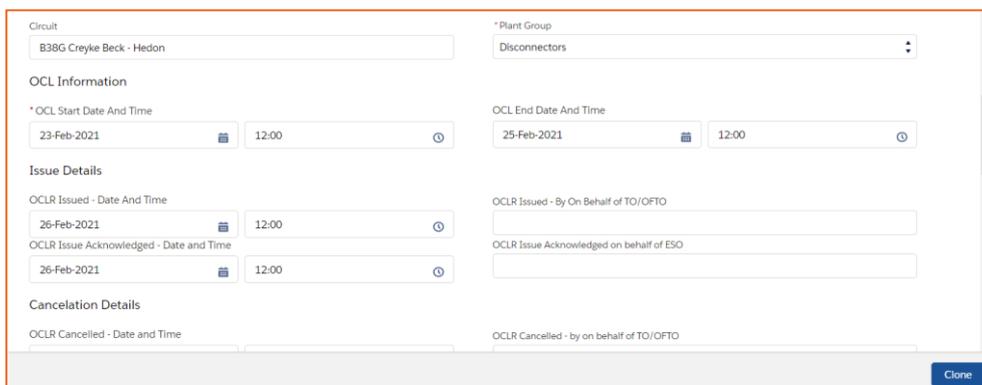
5. Your cloned OCLR is created at OCLR Drafted status and you can take it through workflow as described previously in this document:
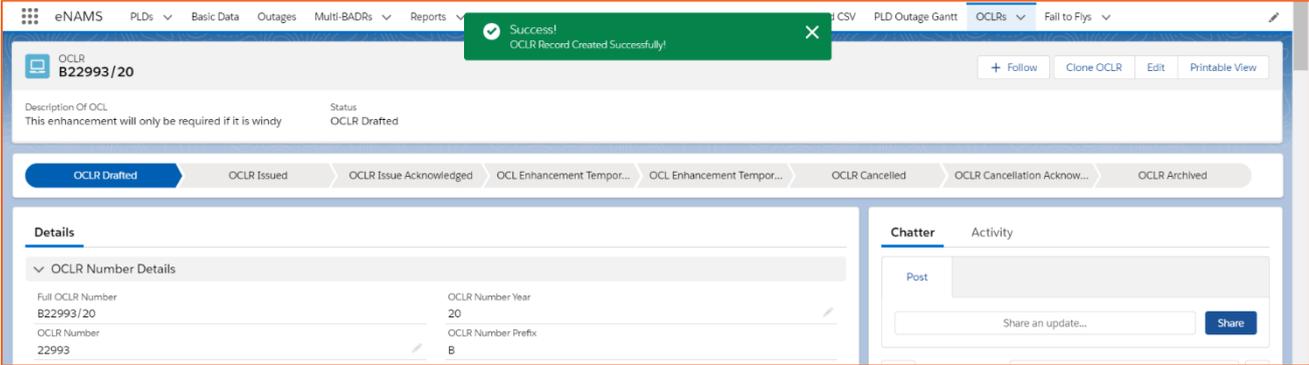
OCLR Report

There is a report on OCLRs for SOs and TOs accessed via:

1. **Reports** > **All Report Folders** > **EN_eNAMS_Reports**
2. Click **EN OCLRs with OCLR Substations Report** (can be viewed by TOs and SOs):
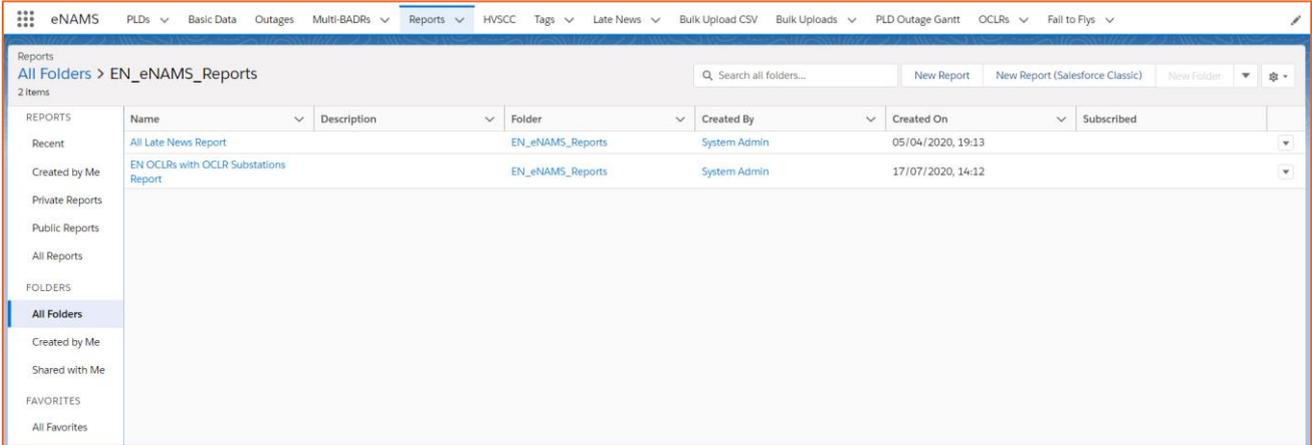
3. The report is shown below - you can use ▼ top right to filter e.g. by date:
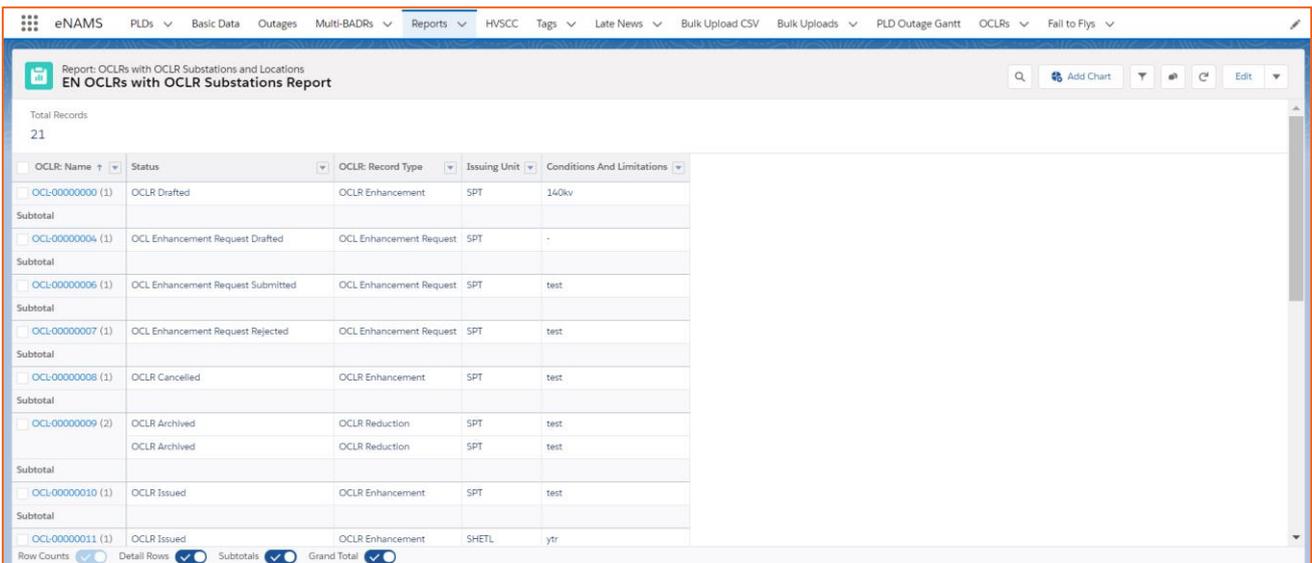
4. You can export the report to Excel via the Export button:

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