

OCLR

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):

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

If equipment efficiency changes, create a **Technical Limitation**. If equipment operation level changes, this is a **Ratings Change**. OCLRs must factored in when scheduling Outages. On the navigation bar, you may need to press **More** to access **OCLR**. Use **Recently Viewed** filter box top left to view existing OCLRs by type and status.

Enhancement

1. At the top right of the OCLR screen, the ESO clicks the **New** button
2. Select an option ("**OCLR Enhancement**" is covered in the *OCLR User Guide*):

Select a record type

- OCL Enhancement Request
- OCLR Enhancement
- OCLR Reduction

Cancel Next

3. Select **OCL Enhancement Request**, this is an extra step performed by the ESO to ask the TO for an Enhancement – click **Next**
4. Complete the **Issuing Unit** OR select **Other Issuing Unit**; you can't select both
5. If required, complete the fields to **Request/ Remove TO/OFTO**
6. Type in **Circuit** and select **Plant Group** that the Circuit comes under (e.g. **Overhead Line**)

7. Complete the **OCLR Start/End Date and Time** – when the Enhancement will be in effect
8. Complete the **Enhancement Request Rating Information**, e.g. 1520MVA
9. Add **Reason for OCL Enhancement Request**.
10. **OCLR Enhancement Requested By / Date and Time** auto complete with your details, complete if submitting on behalf of someone else.

Circuit / Equipment Information (Substations below)

Circuit: B38G Creyke Beck - Hedon
Plant Group: Overhead Line
Outage: Search Outages...

Enhancement Request Information

*OCL Start Date And Time: Date: 23/02/2021, Time: 12:00
*OCL End Date And Time: Date: 26/02/2021, Time: 12:00
*Enhancement Request Rating Information: 1520MVA
*Reason for OCL Enhancement Request: Enhancement request - up rating to 1520MVA

11. Click **Save** and you can see the statuses: OCL Enhancement Request Drafted, OCL Enhancement Request Submitted, OCL Enhancement Request Approved, OCL Enhancement Request Rejected, Rejected OCL Enhancement Request Archived.
 12. **Before submitting to the TO, add at least 1 Substation – get an error if you don't – scroll down to bottom and click Add Substations.**
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- OCLR Substations (0) Add Substations
13. At **Substation Code**, enter relevant substation code name, e.g. **CREB2** for Creyke Beck and click **Search Substations** – tick the relevant substation and click **Add Substations**.
 14. Click **Add Substations** again enter code for the other substation involved, e.g. **HEDO2** for

Hedon - click **Search Substations** – tick the relevant substation and click **Add Substations**. Both substations are displayed in the OCLR Substations area of the screen.

15. Click button **Submit OCL Enhancement** top right - status at top moves to **OCL Enhancement Request Submitted**.
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- + Follow Submit OCL Enhancement Convert to OCLR Enhancement Printable View
16. The **TO** would now go to **OCLR** tab - from the **Recently Viewed** filter, select **Enhancement Request – Submitted**
 17. Click the **OCL Name** to open it
 18. Enter **Conditions and Limitations** and **TO Approval Comments**, then click **Save**
 19. Add more substations/files if required but need to edit **Status** top right from **OCL Enhancement Request Submitted to OCL Enhancement Request Approved** (or reject).
 20. Next, need to convert the request to an actual enhancement – click the button **Convert to OCLR Enhancement** (you can only do this when request at "approved" status)
 21. Form appears, input **OCLR Number** 5-digit number that TO provides and will be aware of (e.g. **47318**), field limited to 5 numbers and checks for duplicates, and **OCLR Number Year** – 2 digits (e.g. **20**) e.g. *the Full OCLR number is B47418/20*
 22. Only other mandatory field is **Description of OCL** – deliberately not pulled from Description entered by ESO to prompt TO to add information, e.g. "**Enhancement will only be required if it is windy**".
 23. Click **Update** bottom left - full OCLR Number is generated, made up of number prefix, e.g. B for NGET, 5-digit OCLR number assigned above, and the OCLR number year.

24. Press **F5** to refresh screen, then select **Operational Effect**:
 - a. **Technical Limitation** – technical problem or change (SEE REDUCTION BELOW)
 - b. **Rating Change** – changing the rating of equipment – e.g. from 1500 to 1550 MVA
25. Click **Save**
26. Scroll back to the top - the OCLR is now in **OCLR Drafted** status – edit **Status** field, select **OCLR Issued** then **Save** – scroll down to **Issue Details** – date/time and your user ID are auto-populated.
27. The ESO would now go back to your OCL Request and refresh the screen – it has now become an **OCLR Enhancement** (see **Record Type** at the top)
28. Scroll down and add **Affected Users** if required
29. Change the **Status** from **OCLR Issued 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 completed – can click the **red triangle** above Save to remind you which fields to complete. The ESO would then update the **Status** field to **OCLR Enhancement Temporary Suspension Acknowledged** and **Save**.

Once OCLR no longer required, TO sets **Status** to **OCLR Cancelled**, ESO sets **Status** to **OCLR Cancellation Acknowledged** and **Save**. Finally, the OCLR can be archived via Status to remove from the Cancelled view.

Reduction

1. At the top right of the OCLR screen, the TO clicks the **New** button
2. Select **OCLR Reduction** then **Next**
3. Enters **OCLR Number** 5-digit number that TO provides (e.g. **47318**) – 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 is **B47318/20**
4. Click into field **Operational Effect** – and select **Technical Limitation** (can do Rating Change)
5. At **Circuit**, input description of circuit affected, e.g. **REDBRIDGE-TOTTENHAM 1**
6. Select **Plant Group**, e.g. **Overhead Line**
7. Set **OCL Start/End Date/Time**
8. At **Description of OCL** – add description
9. At **Conditions And Limitations** enter when the issue occurs or **N/A** if not required.
10. Click **Save**. *NOTE: there is no “suspension” process with a reduction.*

The screenshot shows the OCLR system interface for OCLR 00000021. The top section displays the Issuing Unit (SPT), Full OCLR Number (C12345/20), Record Type (OCLR Reduction), and Status (OCLR Drafted). Below this is a navigation bar with tabs for OCLR Drafted, OCLR Issued, OCLR Issue Acknowledged, and OCLR Cancelled. The main content area is titled 'Details' and contains two sections: 'OCLR Number Details' and 'Details'. The 'OCLR Number Details' section shows the Full OCLR Number (C12345/20), OCLR Number (12345), OCLR Number Year (20), and OCLR Number Suffix (C). The 'Details' section shows the Issuing Unit (SPT), Operational Effect (Technical Limitation), and Status (OCLR Drafted).

11. Scroll down – under **Service Restoration Proposal**, set the **OCLR Indicative Duration** e.g. to **Next Outage** and **Save**
12. Scroll back to the top - the OCLR is now in **OCLR Drafted** status – **before submitting, you need to now add a Substation** – you get

an error if you don't – scroll down to the bottom (can also upload files if required) and click the button **Add Substations**

13. At **Substation Code**, enter a substation code name, e.g. **REDB2** for Redbridge and click **Search Substations** – tick relevant substation, repeat as required, and click **Add Substations**.
14. 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.
15. **ESO** goes to **OCLRs**, from the **filter** drop-down top left, select **Reduction – OCLR Issued**. Alternatively, search for the substation (**REDB2**) using the search box top centre, open it, click the Related tab and all OCLRs for that substation are listed. Look for the most recent in OCLR Issued status and open it.
16. Change Status to **OCLR Issue Acknowledged** and **Save**
17. Scroll down to **Issue Details** – the OCLR was date, time and name stamped with your details.
18. **TO** refreshes screen and changes OCLR status to **OCLR Cancelled** and **Save**
19. ESO refreshes screen and changes OCLR status to **OCLR Cancellation Acknowledged** and **Save** – scroll down and you'll see the Cancellation Details have been populated.
20. Add actions off the back of the OCLR, in the section Actions and Audit (ESO Internal) under **Actions and Updates**.

OCLR Report

1. Access via: **Reports > All Report Folders > EN_eNAMS_Reports**
2. Click **EN OCLRs with OCLR Substations Report** (can be viewed by TOs and SOs)
3. Use **▼** to filter e.g. by date, or export to Excel.