eNAMS User Guide

OCLRs - Operational Capability Limit Records

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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:

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)

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:

![Enhancement Request Information](image)

- **OCL Start Data And Time**
  - Date: 15/02/2021
  - Time: 12:00
- **OCL Enhancement Request Rating Information**
  - 1520MVA
- **OCL End Date And Time**
  - Date: 27/03/2021
  - Time: 12:00
- **Reason for OCL Enhancement Request**
  - Enhancement sought to use the post fault (100%) continuous rating of 13000MVA per fault to avoid a potential thermal constraint. The enhancement will only be required if it is intro[...]

![Enhancement Request Response](image)

- **Conditions And Limitations**
- **Default OCL**
- **TO Approval Comments**

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”:

![OCL Enhancement Request Drafted](image)

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**:

![Add Substations](image)
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**:

![Image of OCL Enhancement Request Submitted]

**Log in as a TO Outage Planner (OR AS AN ESO):**

17. Go to the **OCLR** tab - from the **Recently Viewed** filter, select **Enhancement Request – Submitted**:

![Image of Recently Viewed Filter]

18. Click the submitted OCL Enhancement Request **Name** to open it:

![Image of OCL Enhancement Request Submitted Filter]
19. Scroll down and click the ✍️ to enter **TO Approval Comments**: 

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**:

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**:

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):
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:

![Form Image]

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:

![Form Image]

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:

![Affected Users (1)]

<table>
<thead>
<tr>
<th>Account</th>
<th>Affected User Type</th>
<th>Access Level</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Transmission plc</td>
<td>Affected User</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

35. Click ✉️ to change the **Status** to **OCLR Issue Acknowledged** and **Save**:

![Status Change]

**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.

Log in as TOOP (OR AS AN ESO):

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

2. Select OCLR Enhancement 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 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**:

![Add Substations](image)

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

![Search Substations](image)

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

![Add Substations](image)

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:

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:
Log in as ESO:

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

- Full OCLR Number: E33447/20
- OCLR Number Year: 20
- OCLR Number Prefix: B

Details:
- Issuing Unit: NET
- Other Issuing Unit: Search Accounts...

Details:
- OCLR Cancellation Acknowledged

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

- OCLR Cancelled: 30/10/2020 14:24
- OCLR Cancelled Acknowledged Date: 30/10/2020 14:31

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**:

- Actions and Audit (SO Internal)
  - [Actions and Updates](#)
  - OCLR TSE Audit Data
Reduction

Log in as TOOP (OR AS AN ESO):

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:

![Add Substations](image)

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

![Search Substations](image)

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

![Search Substations](image)

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:
Log in as ESO:

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**.
**Log in as ESO:**

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):

   ![Image 1](image1.png)

3. The report is shown below - you can use the top right to filter e.g. by date:

   ![Image 2](image2.png)

4. You can export the report to Excel via the Export button: