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Introduction

The **PLD OUTAGE GANTT** is a visual representation of the PLD Outages in a Gantt Chart view. The view can be filtered to show conflicts and dependencies by refining the filter criteria. Users will follow an indicative process flow: Home screen – Search Outage screen – Display Gantt Chart screen – Customise View.

Access Management

- Log in as a SO: Click on **PLD OUTAGE GANTT** in the main navigation. Note, the SO: will access eNAMS using native salesforce.
- Log in as a TO: Click on **PLD OUTAGE GANTT** in the main navigation. Note, the TO: will access eNAMS using TO portal.

**Logon and access for SO and TO:**

1. Logon to eNAMS homepage. Search for outages and view them using the **PLD OUTAGE GANTT**. Click on PLD OUTAGE GANTT to access from the navigation menu.
   
   a. Note the navigation differs for SO and TO only in accessing the PLD OUTAGE GANTT as described.
   
   b. Note the outages and risks shown will differ for SO (Demand, Generation, Seasonal) and TO (Demand Only).

2. Click on **PLD OUTAGE GANTT**, in the the main navigation menu:
   
   a. The view as an SO:

   ![SO View](image1)

   b. The view as an TO

   ![TO View](image2)
Detailed steps (Search Outage)

3. The **Search Outage** Pop-up will show by default. Use the Search Outage filters to determine what to display on the **PLD OUTAGE GANTT**.

4. Populate the fields in the following **Search Outage** sections (macros, column 1,2,3, Submit Search Outage) as follows:
   
a. Screenshot (Labelled):

![Screenshot of Search Outage sections](image-url)
b. Screenshot (SO Salesforce):

![Screenshot (SO Salesforce)](image)

Macros:

5. **Date Macro**

   For **Outages**, search Macros can be used to view specific time periods: Day Ahead, Week Ahead, 2 Week Ahead (2 Week Ahead shows the current week and next week, not 2 weeks from now):

   ![Date Macro](image)

6. **Reset**

   Use the **Reset** button to clear the **Search Outage** filter view.
Column 1:

7. Planned Start Date/Time
   If you use the Date Macro this information will be automatically populated, otherwise you can manually select a Date/Time.

8. Outage Number
   Search for an Outage if you have the reference number; conventional naming convention would be ON-0000100 as an example.

9. Service
   Use this to choose In Service and Out of Service items.

10. Transmission Owner
    Choose relevant TO: SPT, SHETL, NGET (as an SO you can search for TO’s data).

11. Substation Codes
    Calculated field in Salesforce: Lookup to find accounts and outages as there is a relationship between them.

12. Must Include All Substations
    Use this toggle to include Substations picked.

13. Order By
    There are 3 options to order by: Start Date, Outage Number, Last Updated.

14. Tags
    Calculated field in Salesforce: Lookup to find accounts and outages. Note that inactive Tags will not show unless you access Tags directly.

15. Affected Users
    Access a related database to show associated Affected Users.

16. Bulk Uploads
    Access a related database to show associated Bulk Uploads.

17. Status
    Select the appropriate workflow status of an item in the Available column by clicking that item. Then click to put in into Selected: to use in search (similarly use the to move items from Selected back to Available). If the option is not available use the scroll button to view all possible options.
Column 2:

18. Also Display PLD Details
   Tick the checkbox to display PLD details, as shown:

19. Planned End Date/Time
   If you use the Date Macro this information will be automatically populated, otherwise you can manually select a Date/Time.

20. PLD Reference Number
   Access a related database to show associated PLDs.

21. Outages Which Have Changed Since Date
   This option shows all changed Outages since a particular date that you can select.

22. Other Asset owner
   **Other Asset** owner is a calculated field in Salesforce. This performs a lookup using a database in another table to local a reference that is related to this outage / asset.

23. TO Impact
   This drop down is used to determine the impact severity from P1-P5. Follow business process rules for correct impact.

24. Emergency Return To Service To
   Enter the value associated with **Emergency Return To Service**.

25. Emergency Return To Service Unit
   Select the corresponding units related to the previous field (Emergency Return To Service To). There are 3 units to choose from: minutes, hours, and days.

26. Only Show OnCom Outages
   Show OnCom Outages returns Outages that have OnCom selected as TRUE.

27. Change Type
   Change Type shows if the Outage is Add, Update, TBA or Cancelled.

28. Outage Type
   Select the appropriate workflow status of an item in the Available column by clicking that item. Then click ▶️ to put in into **Selected**: to use in search (similarly use the ◀️ to move items from Selected back to Available). If the option is not available use the scroll button to view all possible options.
**Column 3:**

29. **Only Show Outages Starting And Ending In The Date Range**
   Apply this toggle to filter to show outages starting and ending within a date range.

30. **Emergency Return To Service From**
   Enter the value associated with Emergency Return To Service.

31. **Emergency Return To Service From Unit**
   Select the corresponding units related to the previous field (Emergency Return To Service To). There are 3 units to choose from: minutes, hours, and days.

32. **Operational Note Status**
   Select the appropriate workflow status of an item in the Available column by clicking that item. Then click ▶️ to put in into Selected: to use in search (similarly use the ◀️ to move items from Selected back to Available). If the option is not available use the scroll button to view all possible options.

33. **Only Display**
   Select the appropriate workflow status of an item in the Available column by clicking that item. Then click ▶️ to put in into Selected: to use in search (similarly use the ◀️ to move items from Selected back to Available). If the option is not available use the scroll button to view all possible options.
Submit Search Query:

34. Submit

Click the **Search Outages** button. Click a blue button to submit a search query - if not visible, scroll down to bottom of screen.

35. Outages found

36. Click on your choosen outage and if your search query does not contain anything a message will display: Total 0 records found. If this happens, click on **Back** to return to the Search Outage screen. Note if you click **Back** it will retain your previous search criteria used so be sure to modify the entered search criteria.
Detailed steps (Gantt View)

Gantt Chart View navigation:
The Gantt view will load after clicking Submit and clicking on a particular outage, as shown:

The PLD Outage Gantt view is split in two with a menu and chart. **Menu** is in grey with additional functionality and filters. **Chart** shows the (Outage) Name, Start Date, and Days (duration).

37. Date Range Filter
Note you must first click onto an outage before using this additional filter to auto adjust the view range and readability. Click to filter to the relevant date range **(Day, Week, Month, Quarter, Year)** and **Filter Outages** allows you to return to the Outage Search pop-up to modify the search. **Get Results** is for when the Year range is updated (above the button), then click this button will update the view.

38. Additional Functions: Show Key, Print, Download

Click to Show Key, Print, and download this view as a CSV.

39. Print function allows you to print the current view of the PLD Outage Gantt. Note: adjust layout to landscape and adjust scale to default when printing and check local device settings.

40. Download function allows for exporting a PDF of the current view of the PLD Outage Gantt to be saved locally on your computer.

41. Show Key will open a pop-up displaying the Key, as pictured below:
42. **Additional Functions: Default, Risk, Clash**

Click to show (Default, Risk, and Clash):

![Default, Risk, Clash button]

43. **Risk** (viewed differently if SO/TO):

**SO (Demand, Generation, Seasonal):** If any of the 3 risks are needed but not complete, the colour of an outage is **RED**. If all the 3 risks at no risk (neither completed nor needed checkbox is checked), the colour of an outage is **GREY**. If all the risks which are needed are also complete, the colour of an outage is **GREEN**.

**TO (Demand only):** If Demand Risk is needed but not complete, the colour of an outage is **RED**. If neither the Completed, nor the Needed checkbox is checked of Demand Risk in an outage record, the colour of an outage is **GREY**. If Demand Risk is completed and needed, the colour of an outage is **GREEN**.

44. **Clash view** gives different button options (not including Close button).

**Fade Out:** Clicking this button will change the colouration of the Outage to default paler colour and green border.

**Set to Default:** Clicking this button will change the colouration of the Outage to default colour and default orange border.

**Enhance:** Clicking this button will change the colouration of the Outage to darker colour and red border.

45. **Example view of the Gantt view:**

![Gantt view example]

46. **Resize the Gantt**

Then click on the **Operational Note** under Name to auto resize the Gantt Chart area. Note the line will highlight on clicking it.
Gantt Chart View outage details:

47. Working with an Outage

Double click on an outage to show the detailed pop-up view.

48. Outage Details

For more information on the Operational Notes double click on the pink Operational Note shape on the Gantt chart:

Click on the hyperlink **Name** (Outage reference) to open the Operational Note.
Use the button functions (**Update, Cancel, TBA, Submit**) to modify the Operational Note.
Provide a PLD and then use a function button to update the Outage.

49. Close Outage Details

To return to the Gantt Chart click on **Close**.