

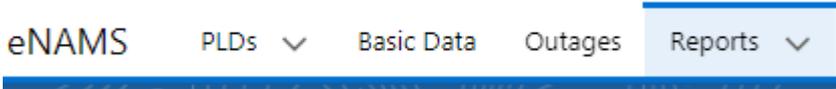
eNAMS Reports Guide

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1. Creating Reports

1) To create your own reports in eNAMS, first navigate to the “Reports” tab in eNAMS:

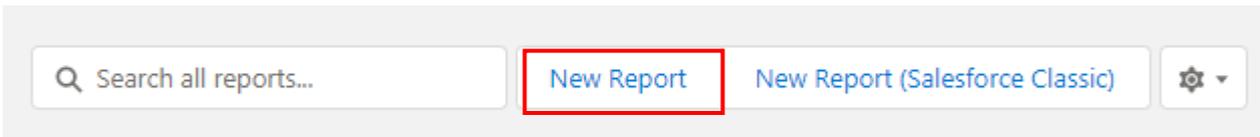


2) There are now two options:

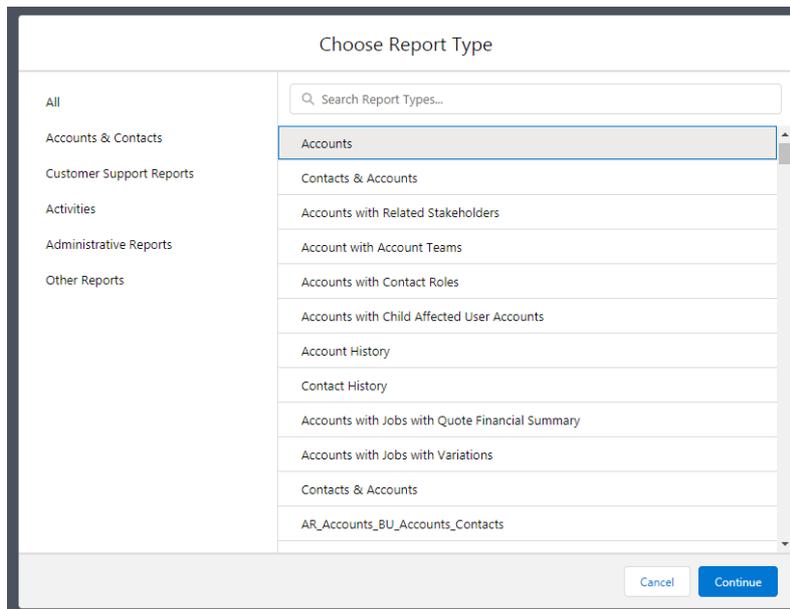
- a) A new report can be created and defined
- b) A pre-defined report can be saved under a new name and modified

1.2a) Using a new report

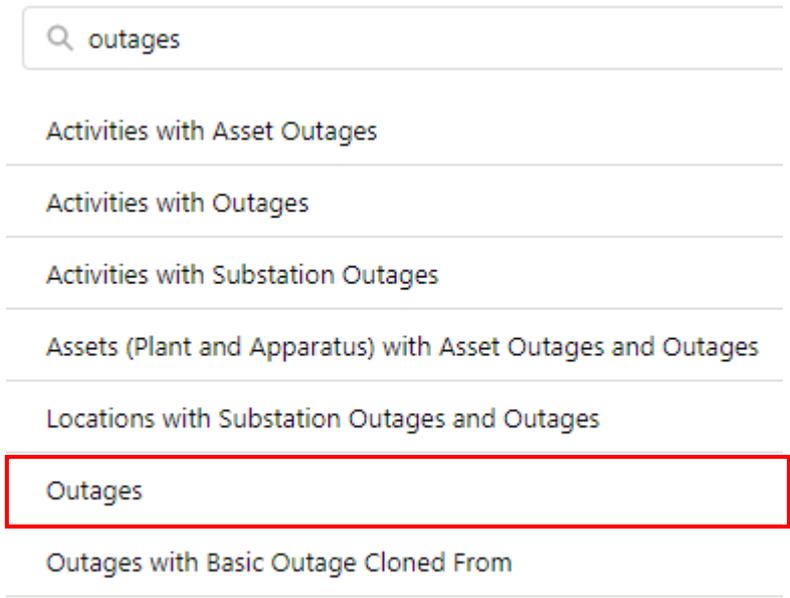
- To define your own Report, click on **New Report** from the Reports page:



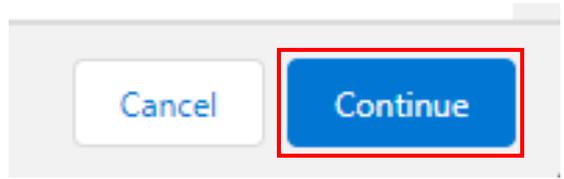
- A page will pop-up to enable you to choose the Report Type:



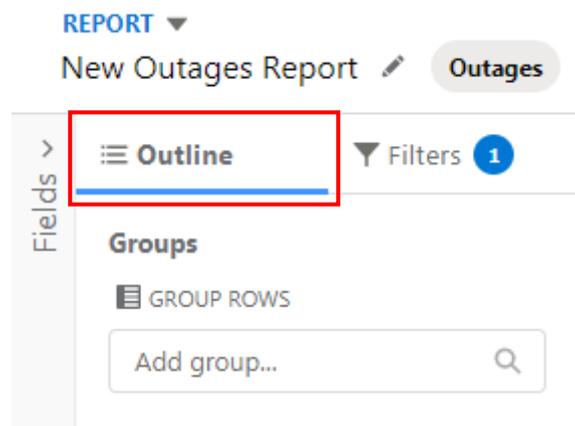
- This allows you to search and select the area of eNAMS which your Report will look in.
- Most commonly, **Outages** will be selected as the Report Type:



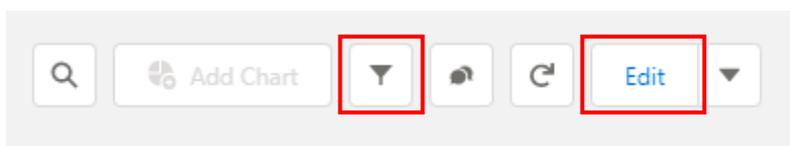
- Once chosen, click **Continue** in the bottom right-hand corner:



- You will automatically be taken to the **Edit** page of the new report. To define the report and filters, first click on **Outline**:



*Note: Once a report has been saved and you navigate back to it by selecting the report name, you will be taken to the Run view. Select **Edit** in the top right-hand corner to modify the report. Filter values can be updated in the Run view by selecting the **filter symbol**:*



- Under **Columns**, define each column which you would like to see in the Report by searching for the field name (Outage Number is automatically defined for you when the 'Outage' report type is chosen):

Columns ▼

Add column... 🔍

Outage: Outage Number ✕

- The suggested columns for the standard reports are as below. The order of the columns can easily be changed by dragging the corresponding box into the desired position:

Columns ▼

Add column... 🔍

Outage: Outage Number ✕

TO Outage Reference ✕

Status ✕

Change Type ✕

Circuit Description ✕

Additional Description ✕

Planned Start Date/Time ✕

Planned End Date/Time ✕

Work Involved ✕

Working Time ✕

ERTS Summary ✕

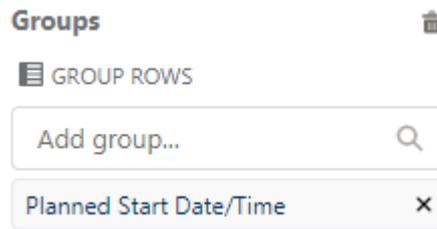
In Service ✕

Owner ✕

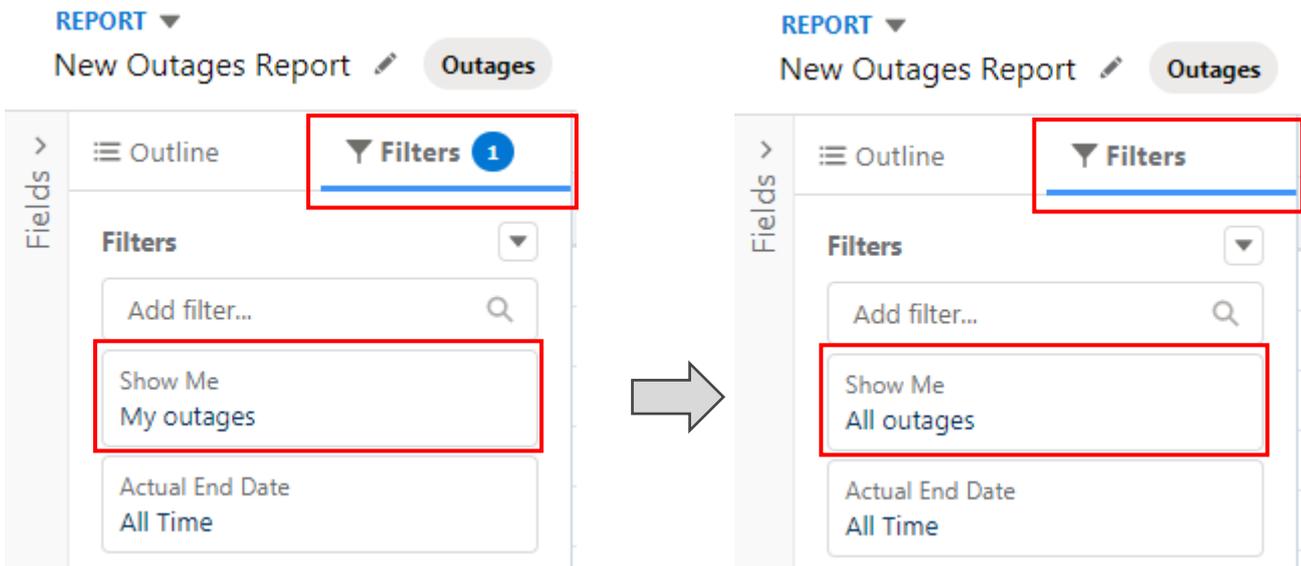
ESO Parties ✕

- It is recommended that any report which filters the "Status" to include "Initial", "With SO", "Approved", "Rejected" or "Cancelled" should replace the column "Outage: Outage Number" with a customised column field or add in the column "Existing Outage Number". This is due to the fact that outage change requests will display the Change Request Number in the "Outage: Outage Number" field and the actual Outage Number will be displayed in the "Existing Outage Number" field. Refer to section 2 in the report for more detail.

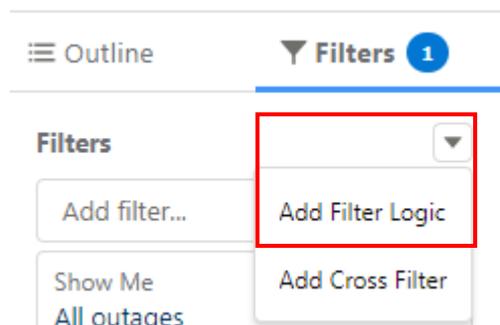
- Under **Groups**, you can define which fields to group the rows of the report by, if you wish to do so. For instance, Planned Start Date/Time has been chosen to enable all Outages with the same Planned Start Date/Time to be grouped together (Groups is not expected to be commonly used):



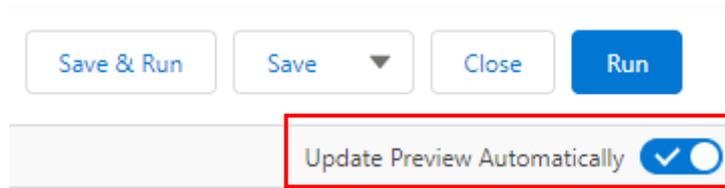
- Next, click on the **Filters** tab and change the **Show Me** field from **My outages** to **All outages**:



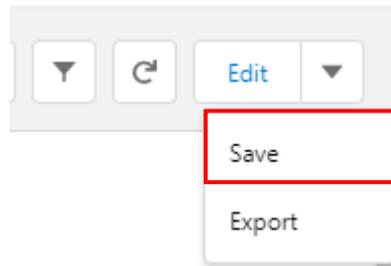
- You may now add any number of filters by searching in the **Add filter** section. For example, Status can be chosen so that the report only displays outages with the selected statuses (e.g. Planned).
- Filter logic will need be added to ensure the report displays the results required:



- When defining your report, it is recommended that the **Update Preview Automatically** button is checked (located at the top right-hand corner of the report). This will automatically update the report view to allow you to preview the report layout and results prior to clicking **Run**:



- After defining the Report, you can either select **Run**, **Save** or **Save & Run** in the top right-hand corner of the page.
 - Selecting **Run** will take you to a new display page of your report. To save from here, you will need to select the dropdown arrow next to **Edit** and select **Save**:



- Selecting **Save** or **Save & Run** will generate a pop-up box titled **Save Report** which is where you can name the report, enter a report description and choose which folder the report is saved in (some users may not have the permissions to save Reports in certain folders):

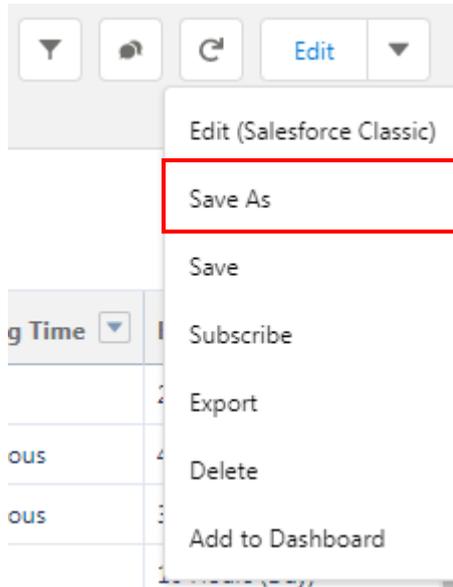
A screenshot of a 'Save Report' pop-up form. The form has a title bar that says 'Save Report'. It contains several input fields: 'Report Name' with the value 'New Outages Report', 'Report Unique Name' with the value 'New_Outages_Report_RLL', and 'Report Description' which is an empty text area. At the bottom, there is a 'Folder' dropdown menu with 'Private Reports' selected and a 'Select Folder' button. At the very bottom right, there are 'Cancel' and 'Save' buttons.

- Once the report has been saved, you can navigate back to the report at any time by selecting the folder you saved the report in (e.g. Private Reports):



1.2b) Using a pre-defined report

- To use a pre-defined report to create your own report, first click on the report you wish to use as your template.
- Then select the dropdown arrow next to the **Edit** button at the top right-hand corner of the page and click **Save As**:



- A pop-up box titled **Save Report As** will then appear, which is where you can name the report, enter a report description and choose which folder the report is saved in (some users may not have the permissions to save Reports in certain folders):

The 'Save Report As' dialog box contains the following fields and options:

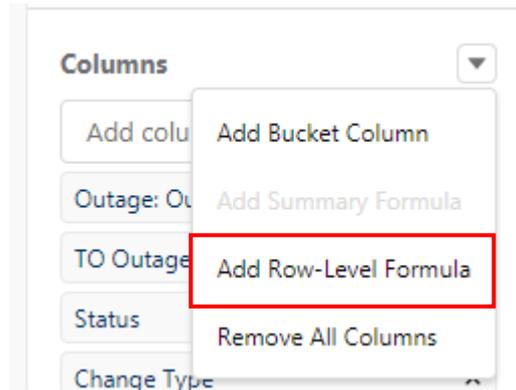
- Report Name:** Copy of General Report (all outages)
- Report Unique Name:** Copy_of_General_Report_all_outages_5qv
- Report Description:** General report containing all outages in the date range
- Folder:** Private Reports (with a 'Select Folder' button)

At the bottom right, there are 'Cancel' and 'Save' buttons.

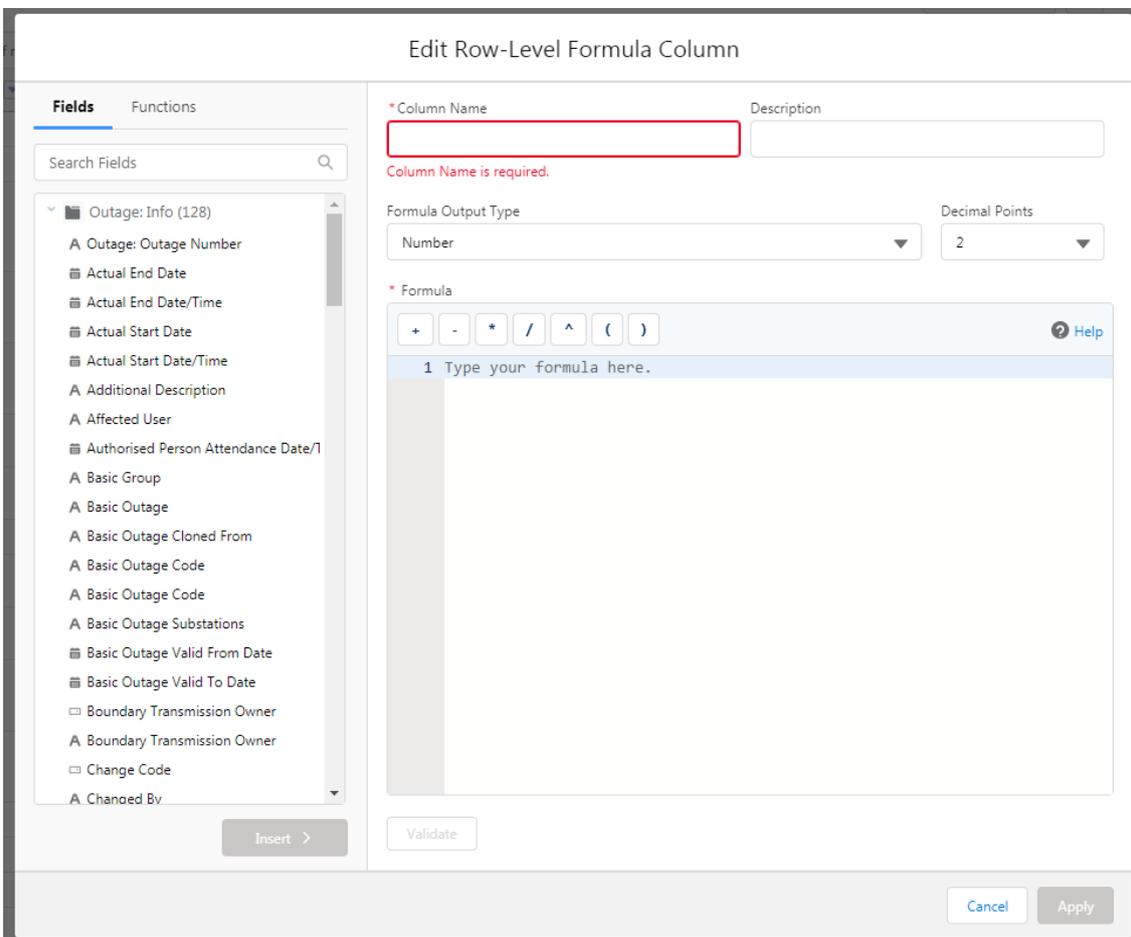
- You will then be taken to a new display page of the report.
- From here, select **Edit** to enter the edit mode and modify the report accordingly (e.g. to display new columns or apply new filters as covered in section 1.2a).

2. Defining customised columns

- Select the report you wish to modify and enter **Edit** mode.
- Then select the dropdown arrow next to **Columns** on the left-hand side of the page and click **Add Row-Level Formula**:



- This will bring up the below pop-up box:



- Enter the name you wish the column to have and select the **Formula Output Type** you need.
- Then enter the formula to define the column and press “Validate” to check the formula is correct.
- Finally select “Apply” and the pop-up will disappear to reveal your newly defined column has been added to the report.
- As mentioned in section 1.2a, it is recommended that any report which filters the “Status” to include “Initial”, “With SO”, “Approved”, “Rejected” or “Cancelled” should replace the column “Outage: Outage Number” with a customised column field or add in the column “Existing Outage Number”. This is due to the fact that outage change requests will display the Change Request Number in the “Outage: Outage Number” field and the actual Outage Number will be displayed in the “Existing Outage Number” field.
- The **Row-Level Formula Column** data required to ensure the outage number displayed is always the Outage Number (regardless of whether the booking is a change request or not) can be seen below:

Edit Row-Level Formula Column

Fields Functions

Search Fields

Outage: Info (128)

- A Outage: Outage Number
- Actual End Date
- Actual End Date/Time
- Actual Start Date
- Actual Start Date/Time
- A Additional Description
- A Affected User
- Authorised Person Attendance Date/1
- A Basic Group
- A Basic Outage
- A Basic Outage Cloned From
- A Basic Outage Code
- A Basic Outage Code
- A Basic Outage Substations
- Basic Outage Valid From Date
- Basic Outage Valid To Date
- Boundary Transmission Owner
- A Boundary Transmission Owner
- Change Code
- A Changed By

Insert >

* Column Name: Outage Number Description

Formula Output Type: Text

* Formula

1 IF(ISBLANK(EN_Outage__c.EN_Original_Outage_Number__c),CUST_NAME, EN_Outage__c.EN_Original_Outage_Number__c)

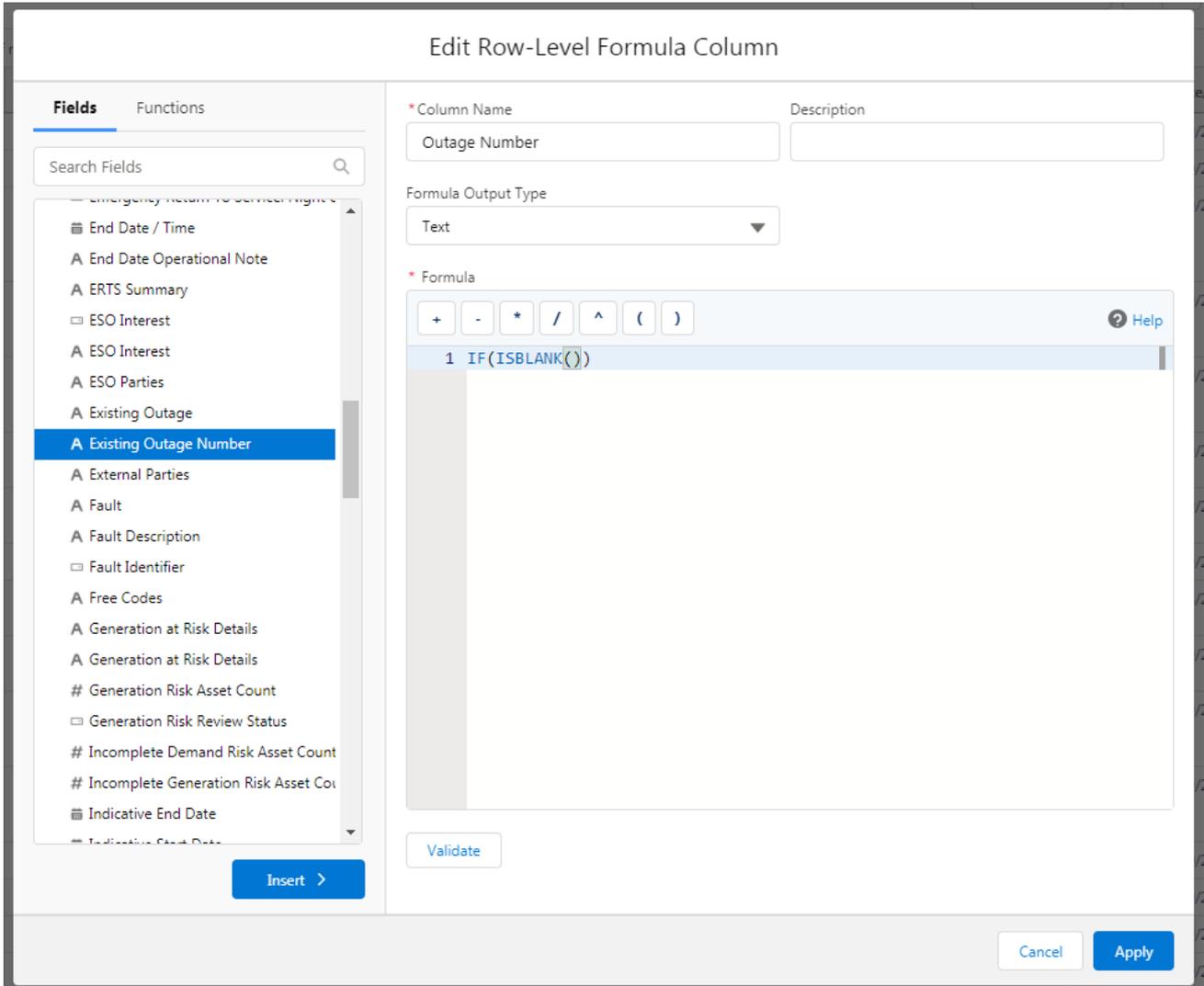
Validate

Cancel Apply

- A copy of the formula used above, can be found below:

IF(ISBLANK(EN_Outage__c.EN_Original_Outage_Number__c),CUST_NAME,EN_Outage__c.EN_Original_Outage_Number__c)

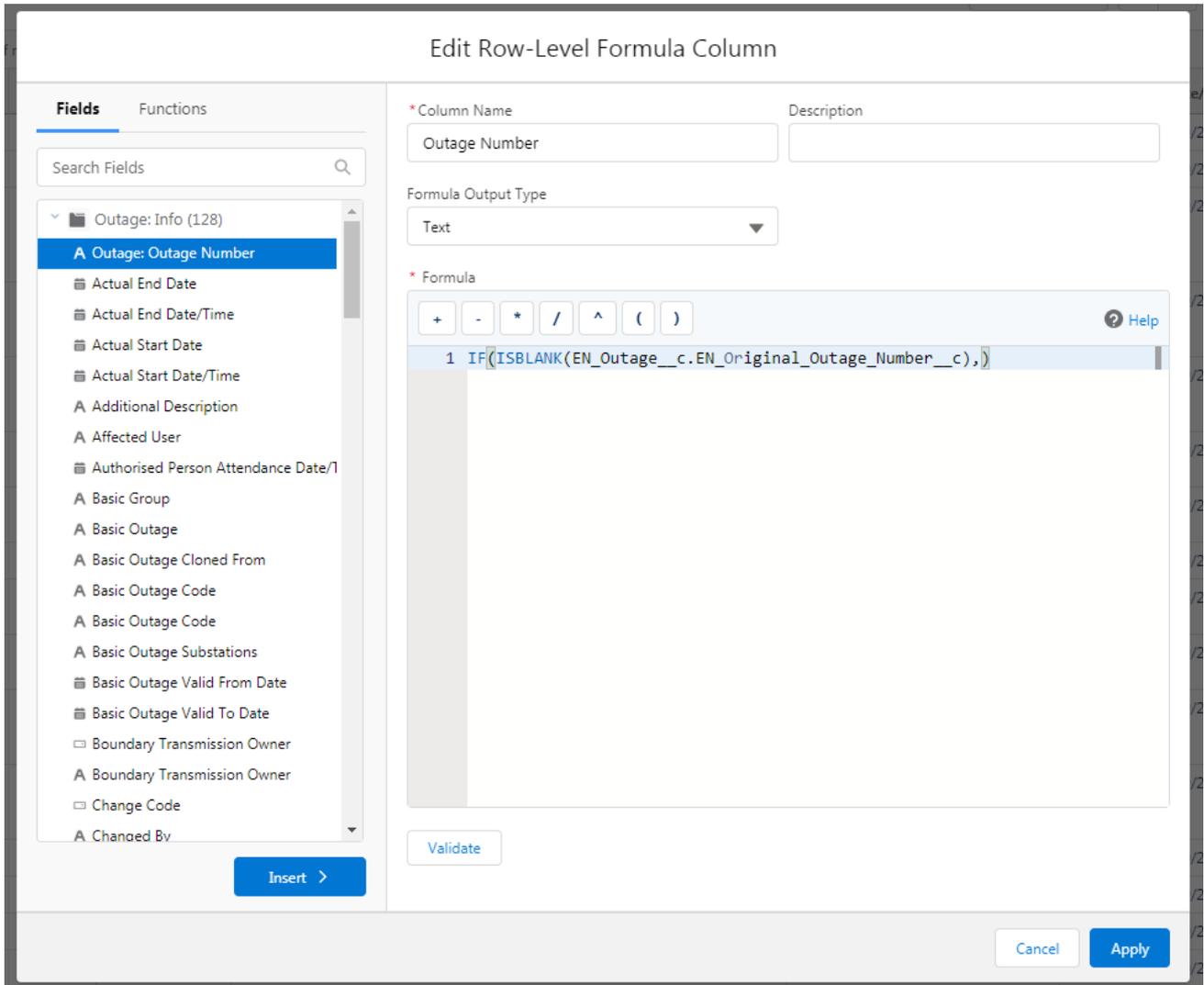
- If the formula is unable to be copied or does not work, please follow the manual instructions below.
- First type in **IF(ISBLANK(** and then select the field **Existing Outage Number**:



- Press “Insert” and the below will be added:

1 IF(ISBLANK(EN_Outage__c.EN_Original_Outage_Number__c))

- Add a comma between the two end brackets and then select the field **Outage: Outage Number**:



- Press “Insert” and the below will be added:

```
1 IF(ISBLANK(EN_Outage__c.EN_Original_Outage_Number__c),CUST_NAME)
```

- Add a comma between the text and the end bracket and then select the field **Existing Outage Number** again. This is the final formula:

```
1 IF(ISBLANK(EN_Outage__c.EN_Original_Outage_Number__c),CUST_NAME,
EN_Outage__c.EN_Original_Outage_Number__c)
```

- Select “Validate” to check the formula is correct and then press “Apply”.

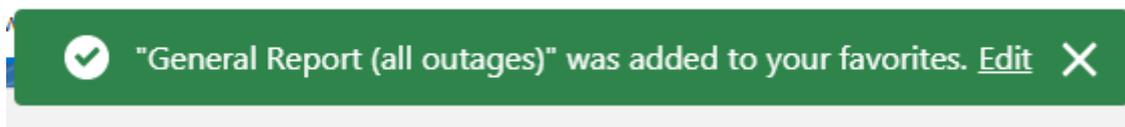
Please note, only one **Row-Level Formula Column** can be created per report.

3. Adding Reports to Favourites

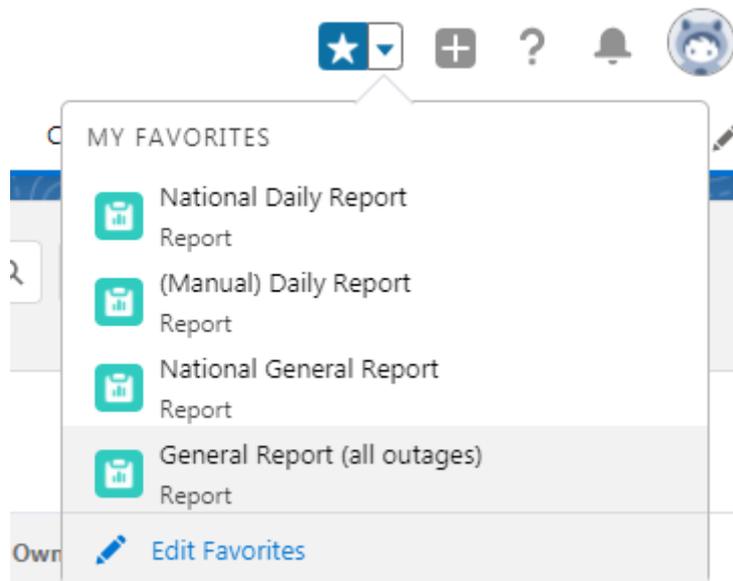
- A Report can be saved as a Favourite to allow you to quickly and easily navigate back to that report from any part of eNAMS. Once you are on the page/report you wish to add to your Favourites, simply click the star icon at the top of the page:



- A confirmation message will then appear:

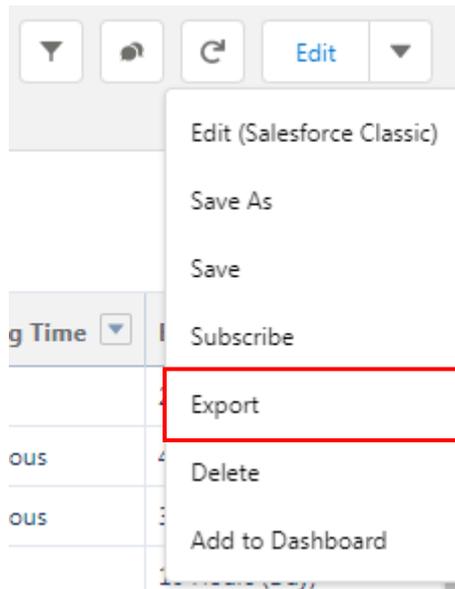


- Your list of Favourites can be viewed by clicking on the dropdown arrow next to the star icon. From this list, you can select the report you wish to navigate to:

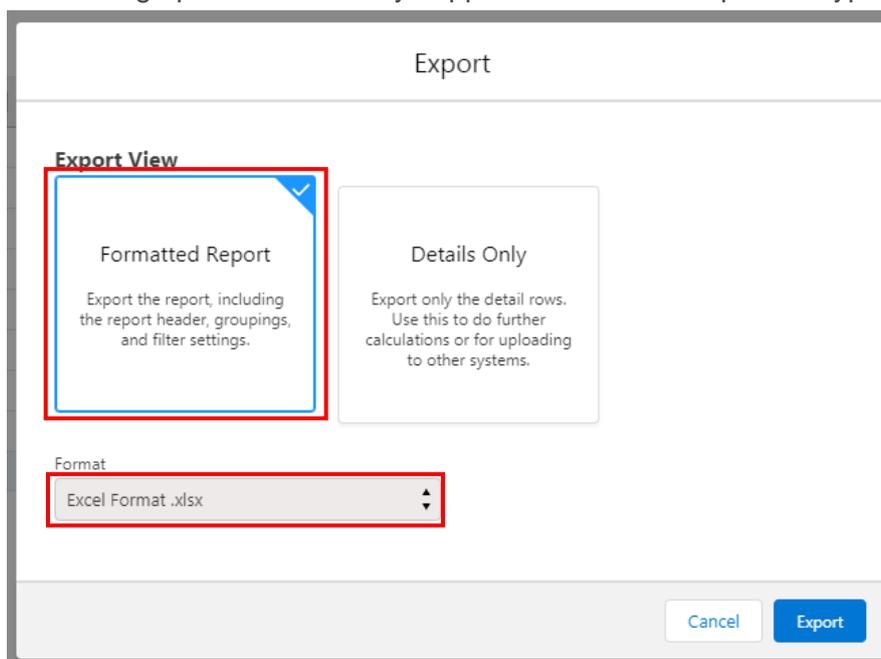


4. Exporting Reports

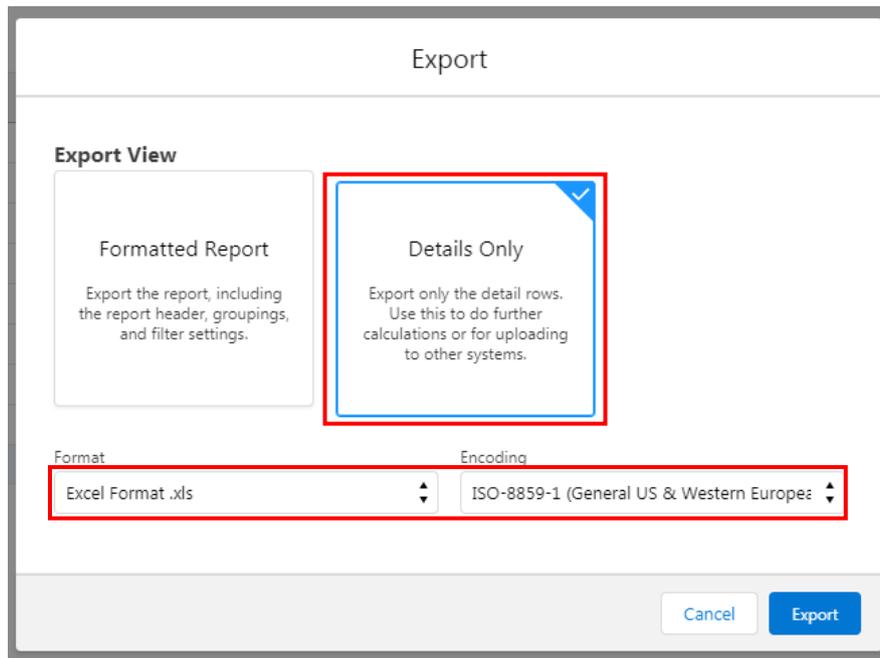
- A Report can be exported for further analysis.
- To do this, once the report has been **Run**, click on the dropdown arrow next to **Edit** and click **Export**:



- There are two options for exporting:
 - **Formatted Report** exports the report as it appears in eNAMS, with the report header, groupings, and filter details. As the formatting is retained, you cannot choose an encoding option and the only supported formatted export file type is .xlsx:



- **Details Only** exports each detail row without formatting and is useful for doing further calculations in a spreadsheet:



- eNAMS does not support exporting a report to PDF or MS Word format.

5. Defining Daily Reports

- 1) There are two main types of Daily Reports to be created:
 - a) A report to show all of the outages taking place during a specific period
 - b) A report to show only outages starting or ending during a specific period

5.1a) Show all outages during a specific period

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name. As previously stated, the suggested columns for the standard reports are as below:

Columns ▼

Add column... 🔍

Outage: Outage Number	×
TO Outage Reference	×
Status	×
Change Type	×
Circuit Description	×
Additional Description	×
Planned Start Date/Time	×
Planned End Date/Time	×
Work Involved	×
Working Time	×
ERTS Summary	×
# In Service	×
Owner	×
ESO Parties	×

- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses “Planned”, “Unplanned”, “Fault” and “Started”. “Complete” and/or “With SO” can be included also if you wish.

Planned End Date: Select “greater or equal” and leave the date blank.

1	Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""	
2	Status equals Planned, Unplanned, Fault, Started	
3	Planned Start Date less or equal ""	
4	Planned End Date greater or equal ""	
5	ESO Parties contains ""	
6	ESO Parties contains ""	

Outage Type: Select all of the options except for “Basic”.

Planned Start Date: Select “less or equal” and leave the date blank.

Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator “contains”.

- Next add the Filter logic. The logic will automatically be generated as “**AND**” for each filter chosen:

INCLUDE ROWS MATCHING
 1 AND 2 AND 3 AND 4 AND 5
 AND 6

- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):

INCLUDE ROWS MATCHING
 1 AND 2 AND (3 AND 4) AND (5
 OR 6)

- You can then select either a specific date or a relative date to enter into the date filters:

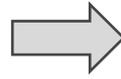
➤ Specific date (e.g. 12/07/2021):

Filter by Planned Start Date

Operator
less or equal

Type Date Use relative date
Value 12/07/2021

Locked i Cancel Apply



3 Planned Start Date less or equal 12-Jul-2021 🗑️

4 Planned End Date greater or equal 12-Jul-2021 🗑️

➤ Relative date (e.g. TOMORROW):

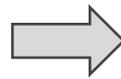
Filter by Planned Start Date

Operator
less or equal

Type Relative Date Use calendar date
Value TOMORROW

Enter a relative date, like YESTERDAY, LAST WEEK, or NEXT 30 DAYS. For a list of supported values, see the Salesforce help.

Locked i Cancel Apply



3 Planned Start Date less or equal TOMORROW 🗑️

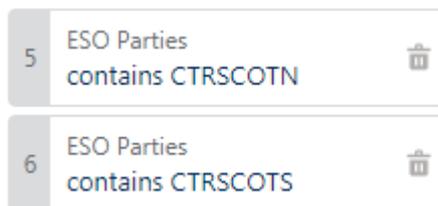
4 Planned End Date greater or equal TOMORROW 🗑️

(Using a relative date allows you to use keywords such as TOMORROW so that you do not have to adjust the date filter every time you run your report. For a full list of keywords click [here](#).)

- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):



(To see a list of the tags to choose from, please navigate to the “Tags” tab and select the “All” option from the drop-down menu. You can also clone a list view and add filters to personalise to your needs.)

5.1b) Show only outages starting or ending during a specific period

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name (as shown in 5.1a above).
- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses “Planned”, “Unplanned”, “Fault” and “Started”. “Complete” and/or “With SO” can be included also if you wish.

Planned End Date: Select “equals” and leave the date blank.

1 Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""

Outage Type: Select all of the options except for “Basic”.

2 Status equals Planned, Unplanned, Fault, Started

Planned Start Date: Select “equals” and leave the date blank.

3 Planned Start Date equals ""

4 Planned End Date equals ""

Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator “contains”.

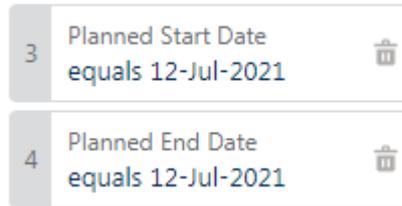
5 ESO Parties contains ""

6 ESO Parties contains ""

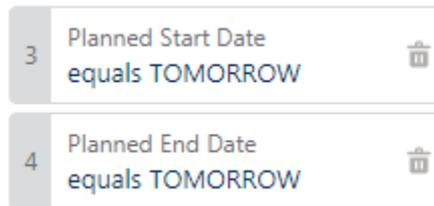
- Next add the Filter logic. The logic will automatically be generated as “**AND**” for each filter chosen.
- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):

INCLUDE ROWS MATCHING
1 AND 2 AND (3 OR 4) AND (5 OR 6)

- You can then select either a specific date or a relative date to enter into the date filters:
 - Specific date (e.g. 12/07/2021):



- Relative date (e.g. TOMORROW):



(Using a relative date allows you to use keywords such as TOMORROW so that you do not have to adjust the date filter every time you run your report. For a full list of keywords click [here](#).)

- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):



(To see a list of the tags to choose from, please navigate to the “Tags” tab and select the “All” option from the drop-down menu. You can also clone a list view and add filters to personalise to your needs.)

6. Defining General Reports

- 1) There are two main types of General Reports to be created:
 - a) A report to show all of the outages taking place during a specific period
 - b) A report to show only outages starting or ending during a specific period

6.1a) Show all outages during a specific period

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name. As previously stated, the suggested columns for the standard reports are as below:

Columns ▼

Add column... 🔍

Outage: Outage Number	×
TO Outage Reference	×
Status	×
Change Type	×
Circuit Description	×
Additional Description	×
Planned Start Date/Time	×
Planned End Date/Time	×
Work Involved	×
Working Time	×
ERTS Summary	×
# In Service	×
Owner	×
ESO Parties	×

- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses “Planned”, “Unplanned”, “Fault” and “Started”. “Complete” and/or “With SO” can be included also if you wish.

Planned End Date: Select “greater or equal” and leave the date blank.

1	Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""	
2	Status equals Planned, Unplanned, Fault, Started	
3	Planned Start Date less or equal ""	
4	Planned End Date greater or equal ""	
5	ESO Parties contains ""	
6	ESO Parties contains ""	

Outage Type: Select all of the options except for “Basic”.

Planned Start Date: Select “less or equal” and leave the date blank.

Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator “contains”.

- Next add the Filter logic. The logic will automatically be generated as “**AND**” for each filter chosen:

INCLUDE ROWS MATCHING
 1 AND 2 AND 3 AND 4 AND 5
 AND 6

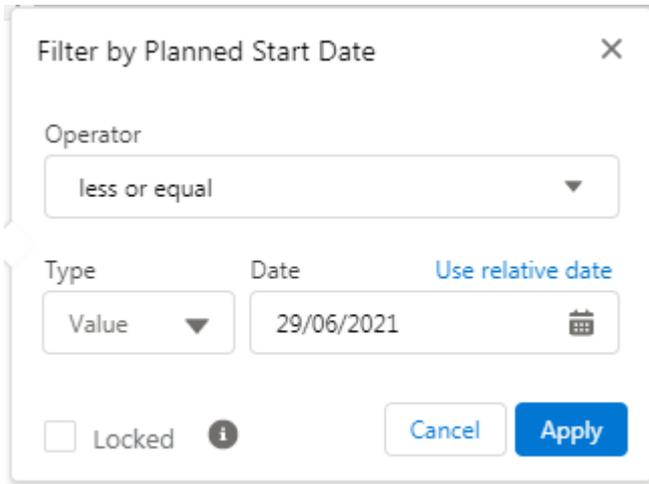
- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):

INCLUDE ROWS MATCHING
 1 AND 2 AND (3 AND 4) AND (5
 OR 6)

- You can then select specific dates to enter into the date filters (note: the end date of your time period needs to be entered into the “Planned Start Date” filter and the start date of your time period needs to be entered into the “Planned End Date” filter):

Time period: 20/06/2021 – 29/06/2021

- Planned Start date (e.g. 29/06/2021):

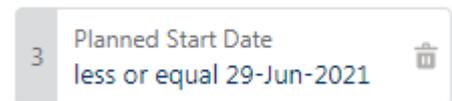
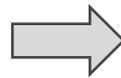


Filter by Planned Start Date

Operator
less or equal

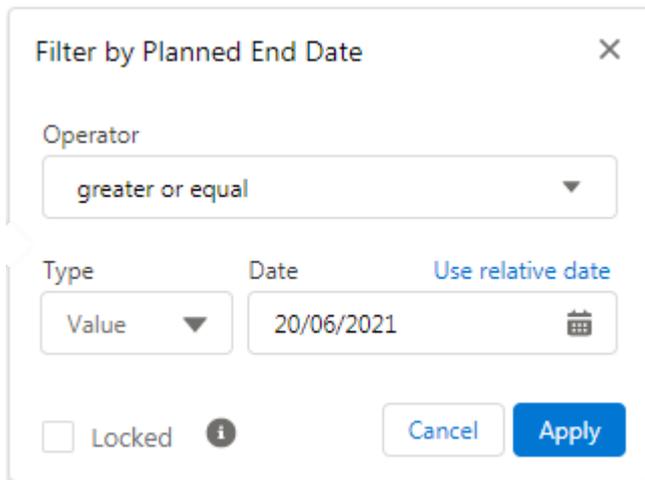
Type Date Use relative date
Value 29/06/2021

Locked ? Cancel Apply



3 Planned Start Date
less or equal 29-Jun-2021

- Planned End date (e.g. 20/06/2021):

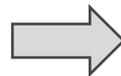


Filter by Planned End Date

Operator
greater or equal

Type Date Use relative date
Value 20/06/2021

Locked ? Cancel Apply



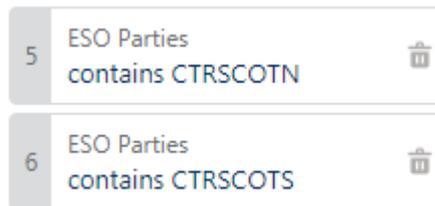
4 Planned End Date
greater or equal 20-Jun-2021

(Using a relative date allows you to use keywords such as TOMORROW so that you do not have to adjust the date filter every time you run your report. For a full list of keywords click [here](#).)

- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):



(To see a list of the tags to choose from, please navigate to the “Tags” tab and select the “All” option from the drop-down menu. You can also clone a list view and add filters to personalise to your needs.)

6.1b) Show only outages starting or ending during a specific period

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name (as shown in 5.1a above).
- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses “Planned”, “Unplanned”, “Fault” and “Started”. “Complete” and/or “With SO” can be included also if you wish.

Planned End Date: Select “greater or equal” and leave the date blank.

Planned End Date: Select “less or equal” and leave the date blank.

1	Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""	🗑️
2	Status equals Planned, Unplanned, Fault, Started	🗑️
3	Planned Start Date greater or equal ""	🗑️
4	Planned Start Date less or equal ""	🗑️
5	Planned End Date greater or equal ""	🗑️
6	Planned End Date less or equal ""	🗑️
7	ESO Parties contains ""	🗑️
8	ESO Parties contains ""	🗑️

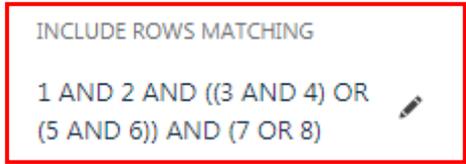
Outage Type: Select all of the options except for “Basic”.

Planned Start Date: Select “greater or equal” and leave the date blank.

Planned Start Date: Select “less or equal” and leave the date blank.

Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator “contains”.

- Next add the Filter logic. The logic will automatically be generated as “AND” for each filter chosen.
- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):



- You can then select specific dates to enter into the date filters (note: the start date of your time period and the end date of your time period need to be entered twice in the order: start, end, start, end. This requires the start date of your time period to be entered into the “Planned Start Date” and “Planned End Date” filters, which is the same for the end date of your time period):

Time period: 20/06/2021 – 29/06/2021

➤ Planned Start date:

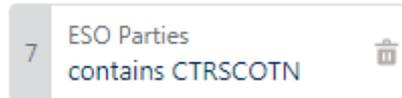


➤ Planned End date:



(Using a relative date allows you to use keywords such as TOMORROW so that you do not have to adjust the date filter every time you run your report. For a full list of keywords click [here](#).)

- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):



(To see a list of the tags to choose from, please navigate to the “Tags” tab and select the “All” option from the drop-down menu. You can also clone a list view and add filters to personalise to your needs.)

7. Defining Changes Reports

- 1) There are two main types of Changes Reports to be created:
 - a) A report to show all outages which have changed up to the moment the report is run
 - b) A report to show all outages which have changed between a specific period

7.1a) Show all outages which have changed up to the report run time

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name. As the Changes Report will include outage change requests, a customised Outage Number column has been created:

Outage Number: This is a customised Row-Level Formula Column. The instructions on how to create this can be found in section 2 of the report.

Columns ▼

Add column... 🔍

fx Outage Number	×
TO Outage Reference	×
Status	×
Change Type	×
Circuit Description	×
Additional Description	×
Planned Start Date/Time	×
Planned End Date/Time	×
Work Involved	×
Working Time	×
ERTS Summary	×
# In Service	×
Owner	×
ESO Parties	×

(The column “Last Modified Date” may wish to be added here for you to see when the outage was last changed/updated).

- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses you wish to see changes for (the suggested statuses are Initial, With SO, Rejected, TBA, Planned, Unplanned, Fault, Started, Complete, Not Taken, Cancelled, Withdrawn, Non-NGESO, "" (No Selection))

1 Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""

Outage Type: Select all of the options except for "Basic".

2 Status equals Initial, With SO, Rejected, TBA, Planned, Unplanned, Fault, Started, Complete, Not Taken, Cancelled, Withdrawn, Non-NGESO, ""

Planned End Date: Select "greater or equal" and leave the date blank.

3 Planned Start Date less or equal ""

Planned Start Date: Select "less or equal" and leave the date blank.

4 Planned End Date greater or equal ""

Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator "contains".

5 Last Modified Date greater or equal ""

Last Modified Date: Select "greater or equal" and leave the date blank.

6 ESO Parties contains ""

7 ESO Parties contains ""

For outages starting or ending during a specific period, see 5.1b) for instructions on how to create this type of report and then add in the Last Modified Date filter as required and adjust the Statuses.

- Next add the Filter logic. The logic will automatically be generated as "AND" for each filter chosen.
- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):

INCLUDE ROWS MATCHING
1 AND 2 AND (3 AND 4) AND 5
AND (6 OR 7)

- You can then select specific dates to enter into the date filters (note: the end date of your time period needs to be entered into the “Planned Start Date” filter and the start date of your time period needs to be entered into the “Planned End Date” filter):

Outage time period: 20/06/2021 – 29/06/2021

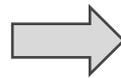
- Planned Start date (e.g. 29/06/2021):

Filter by Planned Start Date ✕

Operator
less or equal

Type Date [Use relative date](#)
Value 29/06/2021

Locked ? Cancel Apply



3 Planned Start Date
less or equal 29-Jun-2021 ✕

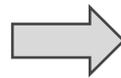
- Planned End date (e.g. 20/06/2021):

Filter by Planned End Date ✕

Operator
greater or equal

Type Date [Use relative date](#)
Value 20/06/2021

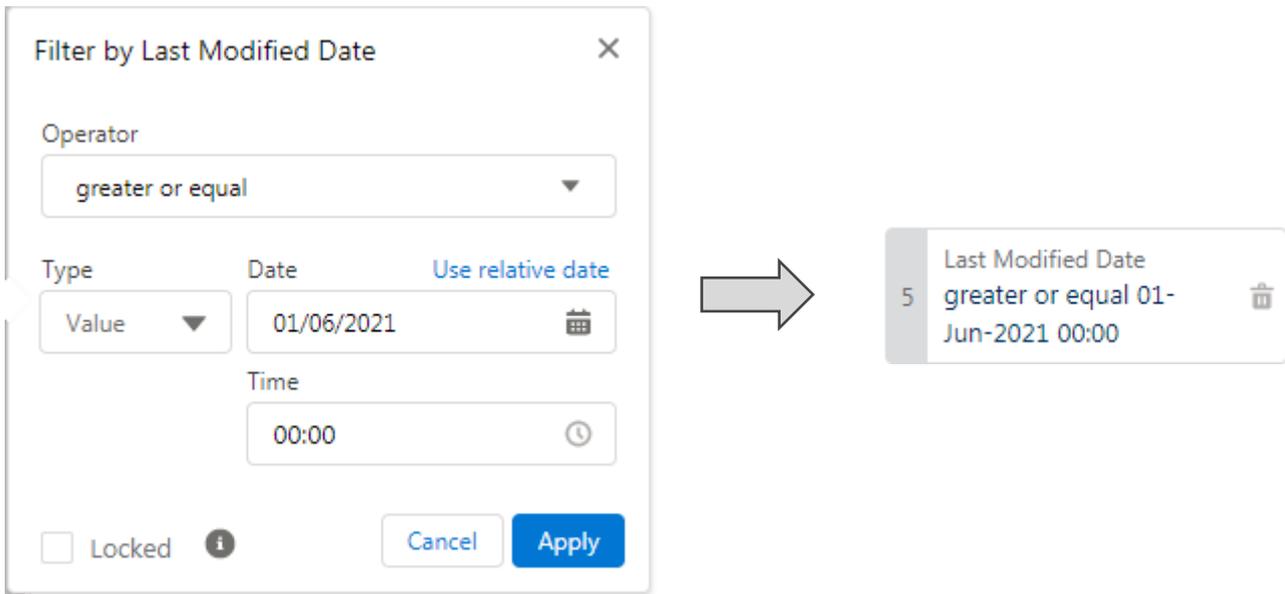
Locked ? Cancel Apply



4 Planned End Date
greater or equal 20-Jun-2021 ✕

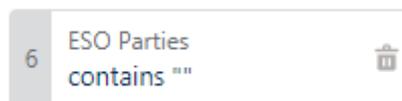
Modified time period: 01/06/2021 – present

➤ Last Modified date (e.g. 01/06/2021):

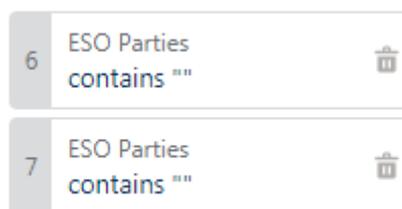


(Using a relative date allows you to use keywords such as YESTERDAY so that you do not have to adjust the date filter every time you run your report. For a full list of keywords click [here](#).)

- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):



7.1b) Show all outages which have changed between a specific period

- Follow the instructions in section 1.2a on how to create new reports, ensuring the Report Type chosen is **Outages**.
- Under **Columns**, define each column which you would like to see in the Report by searching for the field name (as shown in 7.1a above).
- Once the **Show Me** field on the **Filters** tab has been changed to **All outages**, select the following filters:

Status: Select the statuses you wish to see changes for (the suggested statuses are Initial, With SO, Rejected, TBA, Planned, Unplanned, Fault, Started, Complete, Not Taken, Cancelled, Withdrawn, Non-NGESO, "" (No Selection))

1 Outage Type equals Planned, Unplanned, Fault, Non-NGESO, ""

Outage Type: Select all of the options except for "Basic".

2 Status equals Initial, With SO, Rejected, TBA, Planned, Unplanned, Fault, Started, Complete, Not Taken, Cancelled, Withdrawn, Non-NGESO, ""

Planned End Date: Select "greater or equal" and leave the date blank.

3 Planned Start Date less or equal ""

Planned Start Date: Select "less or equal" and leave the date blank.

4 Planned End Date greater or equal ""

Last Modified Date: Select "greater or equal" and leave the date blank.

5 Last Modified Date greater or equal ""

Last Modified Date: Select "less or equal" and leave the date blank.

6 Last Modified Date less or equal ""

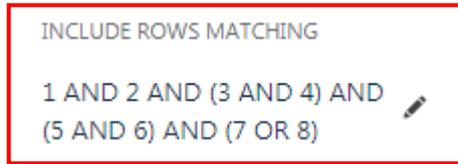
Tags: Select the tag type you wish to use to filter (ESO Parties or External Parties or Affected User). Each tag you wish to use will require a separate filter. Then select the operator "contains".

7 ESO Parties contains ""

8 ESO Parties contains ""

For outages starting or ending during a specific period, see 5.1b) for instructions on how to create this type of report and then add in the Last Modified Date filters as required and adjust the Statuses.

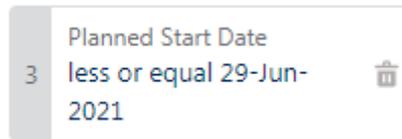
- Next add the Filter logic. The logic will automatically be generated as “AND” for each filter chosen.
- Select the pencil icon to edit the logic to appear as below (depending on how many tag fields have been selected):



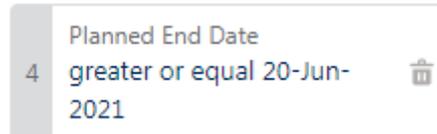
- You can then select specific dates to enter into the date filters (note: the end date of your time period needs to be entered into the “Planned Start Date” filter and the start date of your time period needs to be entered into the “Planned End Date” filter):

Outage time period: 20/06/2021 – 29/06/2021

- Planned Start date (e.g. 29/06/2021):

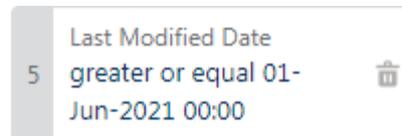


- Planned End date (e.g. 20/06/2021):



Modified time period: 01/06/2021 – 17/06/2021

- Last Modified date (e.g. 01/06/2021):



- Last Modified date (e.g. 17/06/2021):



- You can then enter the tag name you wish to filter on. This is particularly useful for filtering by region, whilst maintaining visibility of cross-boundary outages.
- For example, to see outages in the north of Scotland (and any cross-boundary outages impacting that region):
 - Enter the ESO Parties tag “CTRSCOTN” using only one filter (ensuring you delete any other Tag filter(s) you have):



- Or, to see outages in both the north and south of Scotland (and any cross-boundary outages impacting those regions):
 - Enter the ESO Parties tags “CTRSCOTN” and “CTRSCOTS” in two separate filters (with “OR” logic as mentioned above):

