

Outage Scheduler (OMS) System Generator Owner (GO) Edition

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Market Training
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eLearning

Presentation Outline

- OMS Benefits
- OMS User Requirements
- OMS Application Walk-Through
- Additional Resources

OMS Benefits

Outage Scheduler (OMS) System Benefits

- User-Friendly
- Secure
- Web-based
- Ease of application modifications/upgrades

OMS User Requirements

OMS User Requirements

- Hardware Specifications

	Recommended	Optimal
Graphics Memory (GPU)	512 MB of GDDR4 or higher	2GB GDDR5 or higher
Processor	(4 MB cache, 4 cores, 4 threads) or higher	(6 MB cache, 4 cores, 8 threads) or higher
RAM	8 GB	16 GB
HDD	SSD	M.2 SSD



OMS User Requirements

■ Software Specifications

Product	Required
Operating System	64-bit
Browser	Google Chrome 96 or higher ² Microsoft Edge 96 or higher ² Mozilla Firefox - x64 - 96 or higher ²
Browser Add-ons	Microsoft Silverlight 5.1.50907.0 ³
CSV	Spreadsheet application
PDF	PDF Reader



OMS User Requirements

- Network Specifications

	Recommended	Optimal
Network Connectivity	T1 internet connection	OATInet or other private network connection



OMS User Requirements

■ Digital Certificate

- Valid NAESB Digital Certificate Required
 - Installed on respective computer

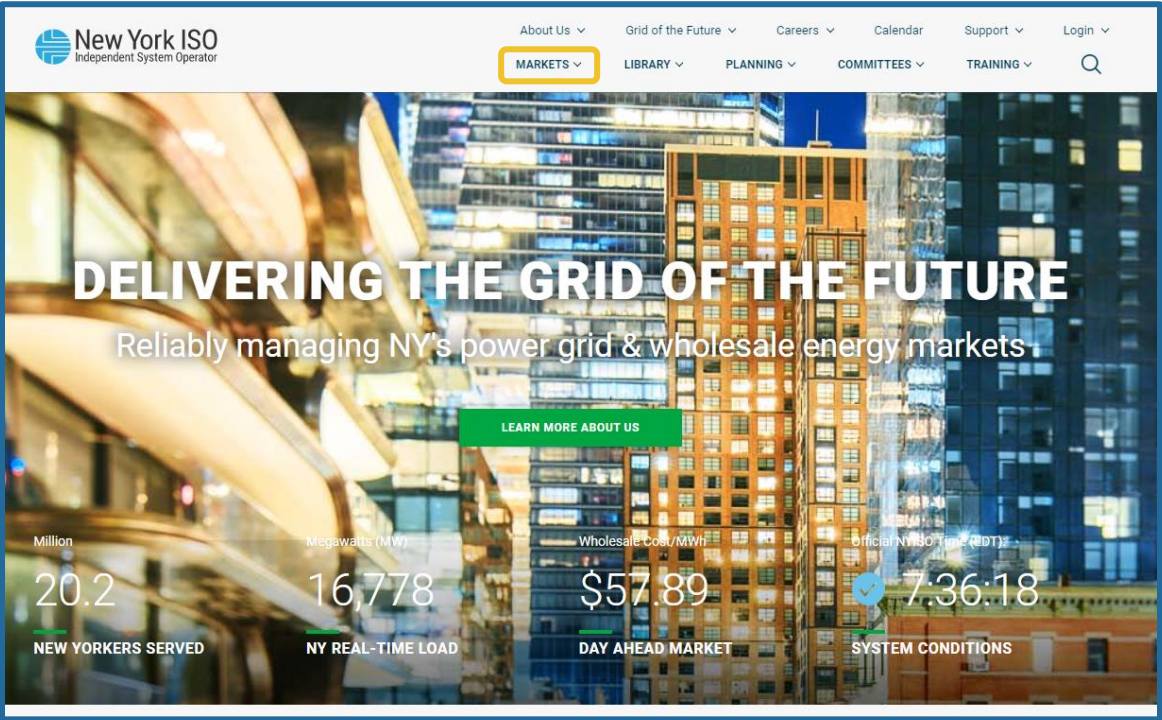
■ MIS Privileges

- 1st OMS Privileges must be set-up for MIS account at *Org Level*
 - Assigned by NYISO
- 2nd OMS Privileges must be assigned to MIS account at *User Level*
 - Assigned by organization's MIS Administrator

OMS Application Walk-Through

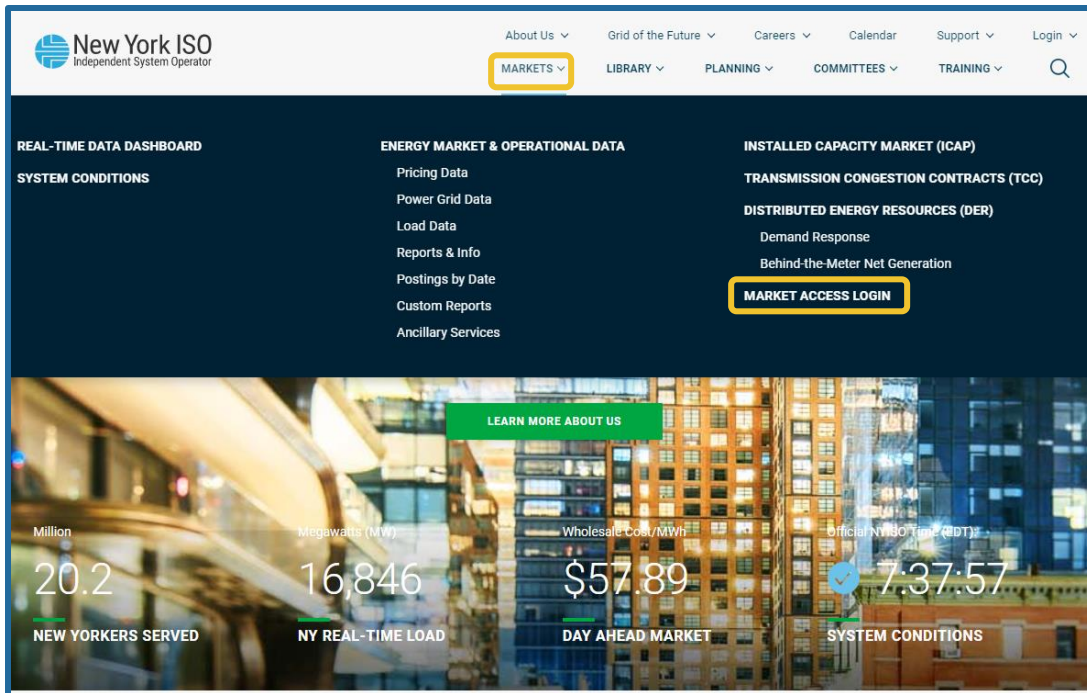
Accessing OMS

- NYISO Market Access Login



Accessing OMS

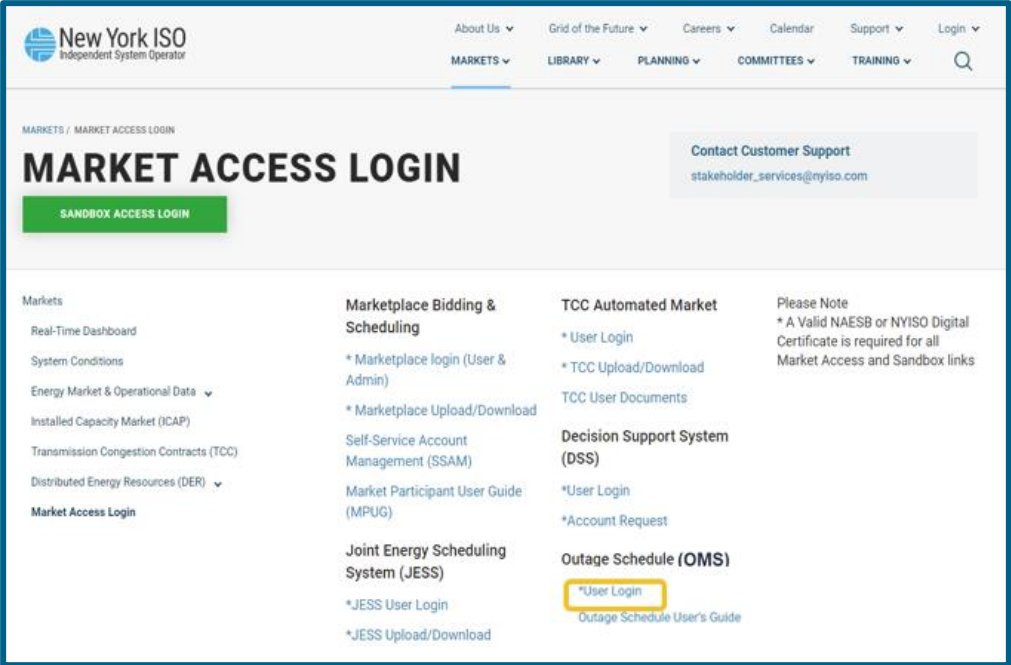
■ NYISO Market Access Login



The screenshot shows the NYISO website interface. The top navigation bar includes the NYISO logo and several menu items: About Us, Grid of the Future, Careers, Calendar, Support, and Login. The 'MARKETS' menu item is highlighted with a yellow box. Below the navigation bar, the main content area is divided into three columns. The left column contains 'REAL-TIME DATA DASHBOARD' and 'SYSTEM CONDITIONS'. The middle column contains 'ENERGY MARKET & OPERATIONAL DATA' with sub-items: Pricing Data, Power Grid Data, Load Data, Reports & Info, Postings by Date, Custom Reports, and Ancillary Services. The right column contains 'INSTALLED CAPACITY MARKET (ICAP)', 'TRANSMISSION CONGESTION CONTRACTS (TCC)', and 'DISTRIBUTED ENERGY RESOURCES (DER)' with sub-items: Demand Response and Behind-the-Meter Net Generation. The 'MARKET ACCESS LOGIN' button is highlighted with a yellow box in the right column. Below the navigation bar, there is a large banner image of a city at night. A green button labeled 'LEARN MORE ABOUT US' is positioned above the banner. The banner displays four key metrics: '20.2 MILLION NEW YORKERS SERVED', '16,846 MEGAWATTS (MW) NY REAL-TIME LOAD', '\$57.89 DAY AHEAD MARKET', and '7:37:57 OFFICIAL NYISO TIME (EDT) SYSTEM CONDITIONS'.

Accessing OMS

- NYISO Market Access Login



The screenshot shows the NYISO website's Market Access Login page. At the top left is the NYISO logo. The top right navigation bar includes links for 'About Us', 'Grid of the Future', 'Careers', 'Calendar', 'Support', and 'Login'. Below this is a secondary navigation bar with 'MARKETS', 'LIBRARY', 'PLANNING', 'COMMITTEES', and 'TRAINING', along with a search icon. The main heading is 'MARKET ACCESS LOGIN' with a sub-link for 'SANDBOX ACCESS LOGIN'. A 'Contact Customer Support' button with the email 'stakeholder_services@nyiso.com' is located on the right. The page content is organized into four columns: 'Markets' (with links like Real-Time Dashboard, System Conditions, Energy Market & Operational Data, etc.), 'Marketplace Bidding & Scheduling' (with links like Marketplace login, Marketplace Upload/Download, etc.), 'TCC Automated Market' (with links like User Login, TCC Upload/Download, etc.), and 'Decision Support System (DSS)' (with links like User Login, Account Request, etc.). A 'Please Note' section states that a valid NAESB or NYISO Digital Certificate is required for all Market Access and Sandbox links. The 'Outage Schedule (OMS)' section has a yellow box around the '*User Login' link.

Accessing OMS

■ OMS User Login

- Enter MIS Username and Password
 - Password is case sensitive

Once Username and Password have been entered, click 'Logon'



f5

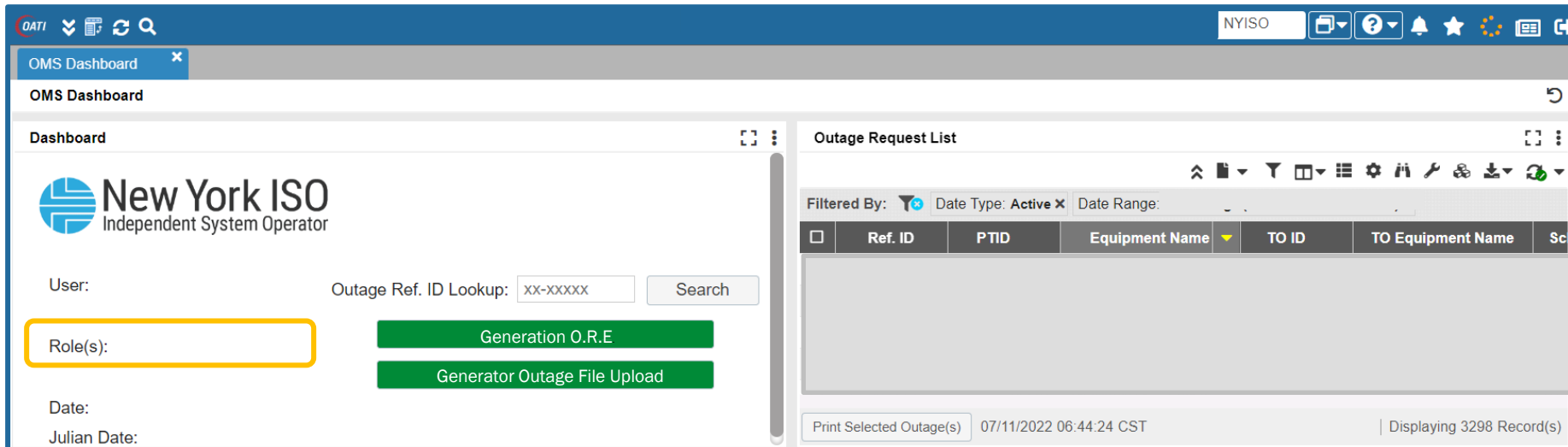
Secure Logon
for nyiso

Username

Password

Logon

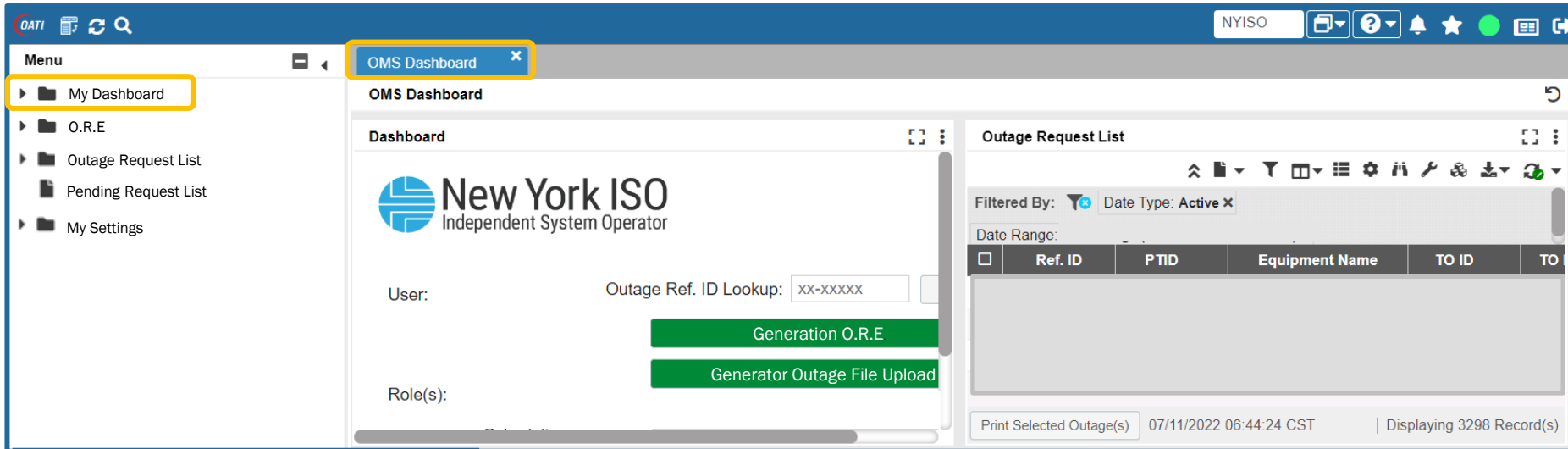
OMS Dashboard



The screenshot shows the OMS Dashboard interface. On the left, there is a sidebar with the New York ISO logo and the text "Independent System Operator". Below the logo, there are input fields for "User:", "Outage Ref. ID Lookup:" (with a search button), "Role(s):" (highlighted with a yellow border), "Date:", and "Julian Date:". There are two green buttons: "Generation O.R.E" and "Generator Outage File Upload".

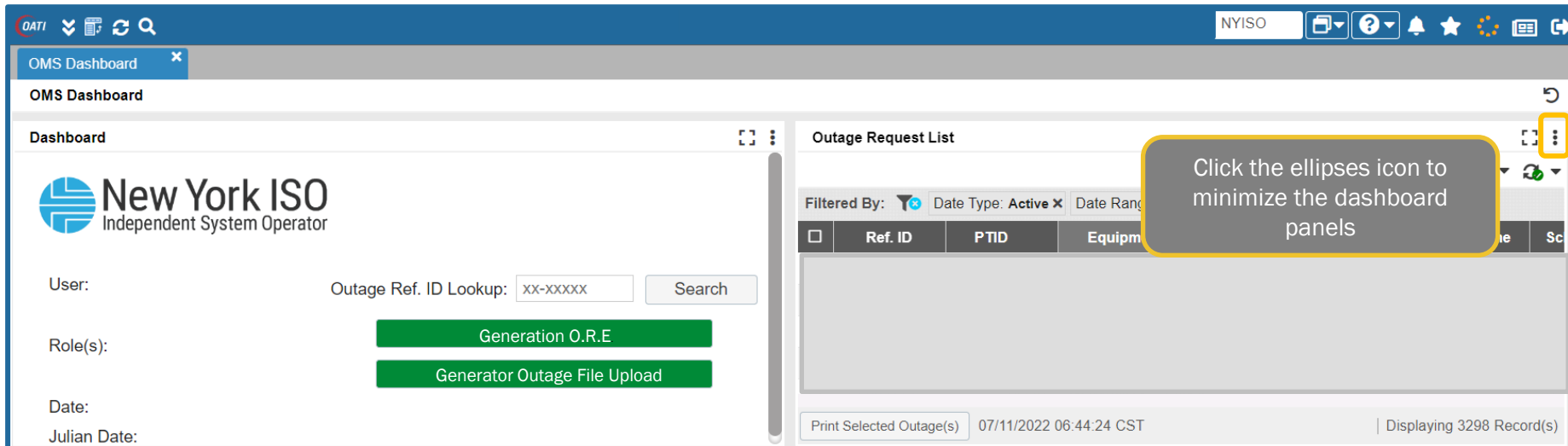
On the right, there is a section titled "Outage Request List". It includes a filter bar with "Filtered By:", "Date Type: Active", and "Date Range:". Below the filter bar is a table with the following columns: "Ref. ID", "PTID", "Equipment Name", "TO ID", "TO Equipment Name", and "Sc". The table body is currently empty. At the bottom of the list, there is a "Print Selected Outage(s)" button and a timestamp "07/11/2022 06:44:24 CST". On the far right, it says "Displaying 3298 Record(s)".

OMS Dashboard



The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main content area is titled 'Oms Dashboard' and features the New York ISO logo and 'Independent System Operator' text. Below this, there are input fields for 'User:' and 'Outage Ref. ID Lookup: xx-xxxxx', and two green buttons: 'Generation O.R.E' and 'Generator Outage File Upload'. On the right, the 'Outage Request List' is shown with a table header containing 'Ref. ID', 'PTID', 'Equipment Name', 'TO ID', and 'TO'. The table body is currently empty. At the bottom of the list, it indicates 'Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)'. The top of the interface includes a search bar with 'NYISO' and various utility icons.

OMS Dashboard



QATI

NYISO

OMS Dashboard

OMS Dashboard

Dashboard

New York ISO
Independent System Operator

User:

Outage Ref. ID Lookup:

Role(s):

Date:

Julian Date:

Outage Request List

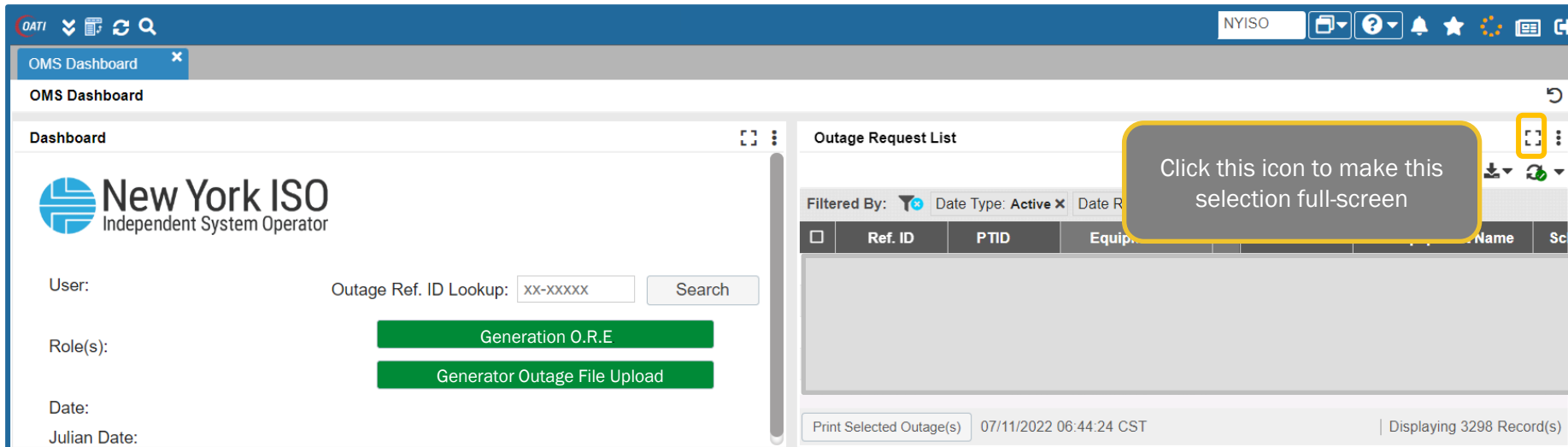
Filtered By: Date Range

<input type="checkbox"/>	Ref. ID	PTID	Equipm	ne	Sc
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Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

Click the ellipses icon to minimize the dashboard panels

OMS Dashboard



Dashboard

New York ISO
Independent System Operator

User: _____

Outage Ref. ID Lookup:

Role(s):

Date: _____

Julian Date: _____

Outage Request List

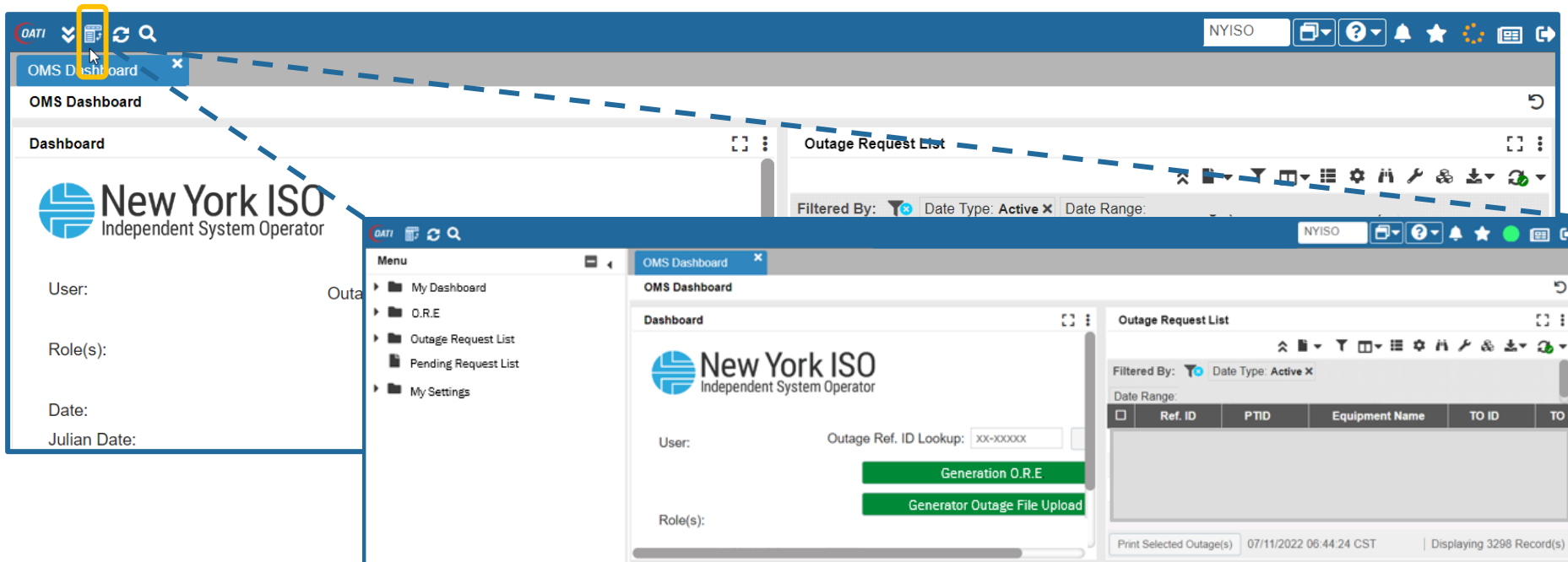
Filtered By: Date Type: Active Date R _____

<input type="checkbox"/>	Ref. ID	PTID	Equip.	Name	Sc
[Empty table body]					

07/11/2022 06:44:24 CST | | | Displaying 3298 Record(s)

Click this icon to make this selection full-screen

OMS Dashboard



The image displays two overlapping screenshots of the OMS Dashboard application. The top screenshot shows a zoomed-in view of the user profile section, with a yellow box highlighting the user information fields. The bottom screenshot shows the full dashboard layout, including a menu, user profile, and an outage request list.

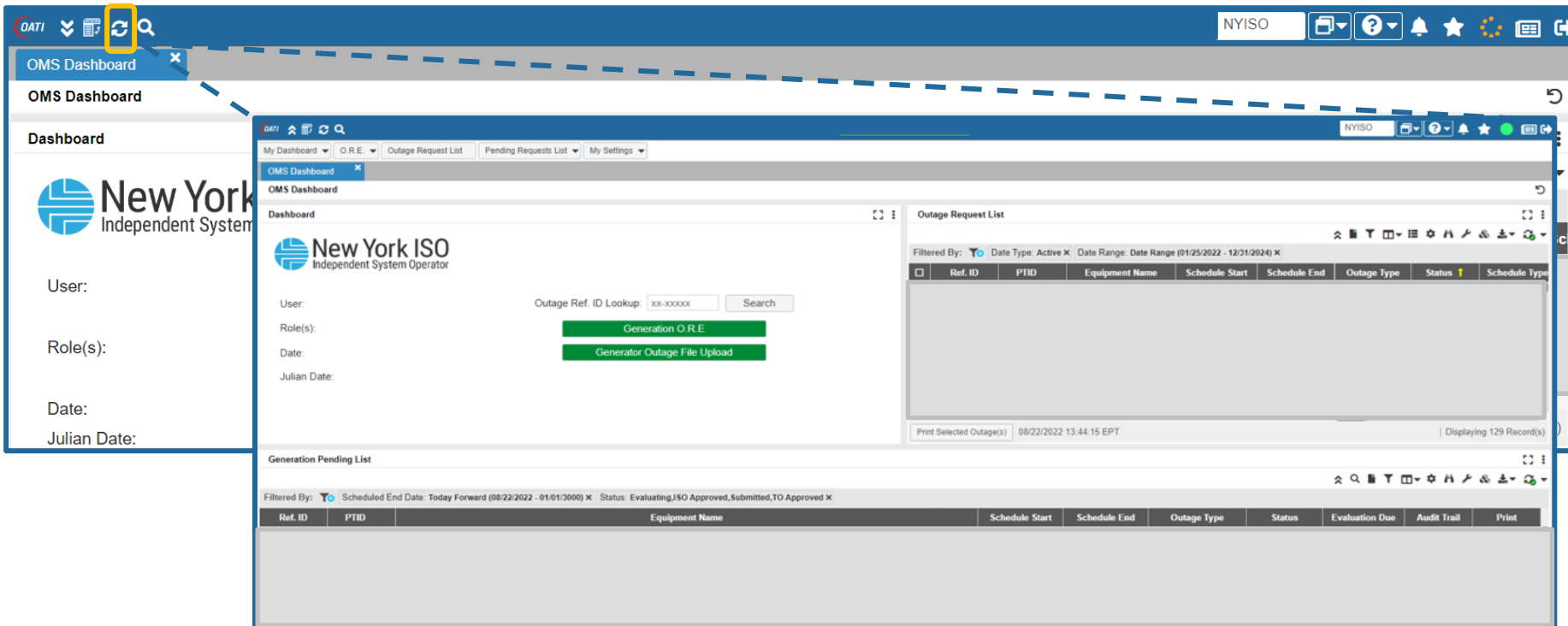
Zoomed-in View (Top):

- Header: GATI, NYISO, and navigation icons.
- Tab: OMS Dashboard
- Section: Dashboard
- Logo: New York ISO Independent System Operator
- User Information Fields:
 - User:
 - Role(s):
 - Date:
 - Julian Date:

Full View (Bottom):

- Header: GATI, NYISO, and navigation icons.
- Tab: OMS Dashboard
- Section: Dashboard
- Logo: New York ISO Independent System Operator
- User Information Fields:
 - User:
 - Outage Ref. ID Lookup: xx-xxxxxx
 - Buttons: Generation O.R.E, Generator Outage File Upload
 - Role(s):
- Menu:
 - My Dashboard
 - O.R.E
 - Outage Request List
 - Pending Request List
 - My Settings
- Outage Request List:
 - Filtered By: Date Type: Active
 - Date Range:
 - Table with columns: Ref. ID, PTID, Equipment Name, TO ID, TO
 - Footer: Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

OMS Dashboard



QATI

NYISO

OMS Dashboard

Dashboard

New York Independent System Operator

User:

Role(s):

Date:

Julian Date:

New York ISO Independent System Operator

User:

Outage Ref. ID Lookup: Search

Generation O.R.E.

Generator Outage File Upload

Generation Pending List

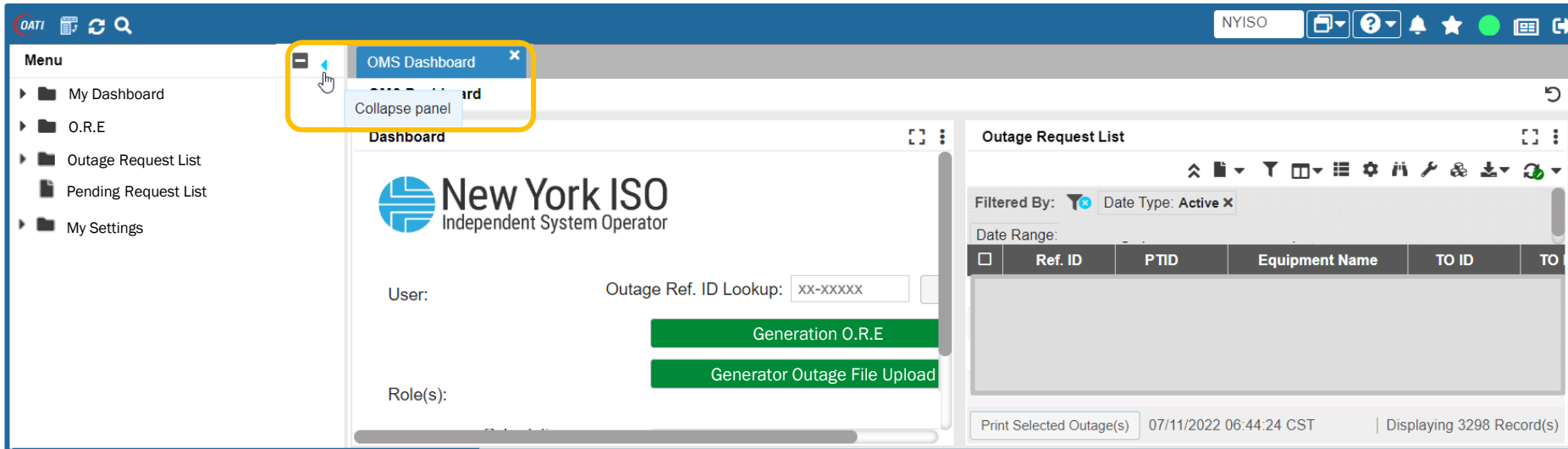
Filtered By: Date Type: Active Date Range: Date Range (01/25/2022 - 12/31/2024) X

Ref. ID	PTID	Equipment Name	Schedule Start	Schedule End	Outage Type	Status	Evaluation Due	Audit Trail	Print
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Print Selected Outage(s) 08/22/2022 13:44:15 EPT | Displaying 129 Record(s)

Filtered By: Scheduled End Date: Today Forward (08/22/2022 - 01/01/3000) X Status: Evaluating,ISO Approved,Submitted,TO Approved X

OMS Dashboard



Menu

- My Dashboard
- O.R.E
- Outage Request List
- Pending Request List
- My Settings

Dashboard

New York ISO
Independent System Operator

User: _____

Outage Ref. ID Lookup:

[Generation O.R.E](#)

Role(s): _____

[Generator Outage File Upload](#)

Outage Request List

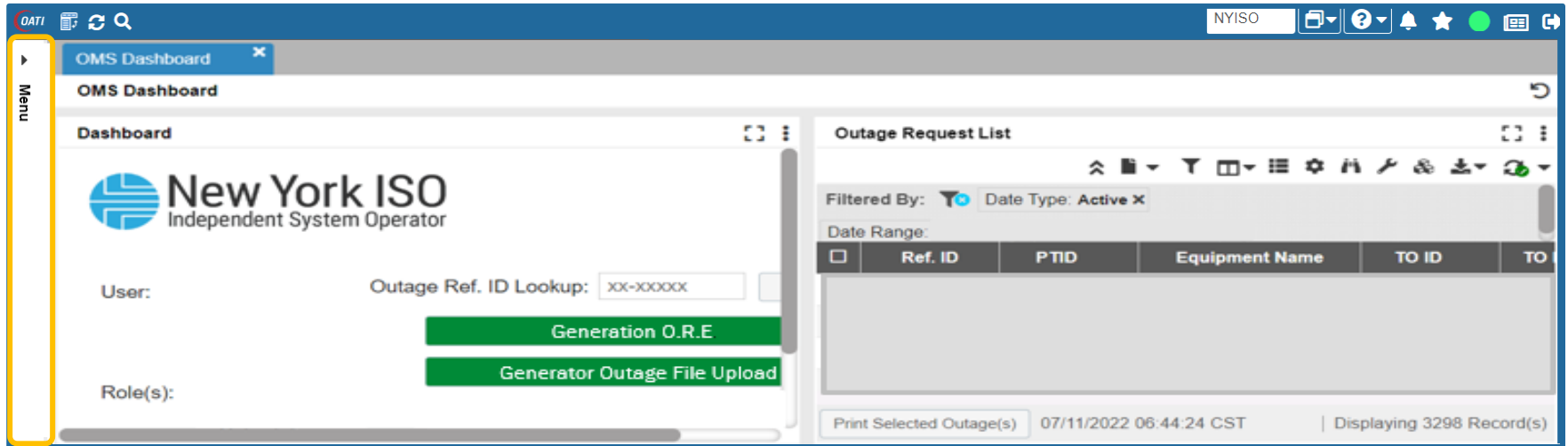
Filtered By: Date Type: Active

Date Range: _____

<input type="checkbox"/>	Ref. ID	PTID	Equipment Name	TO ID	TO
[Empty table body]					

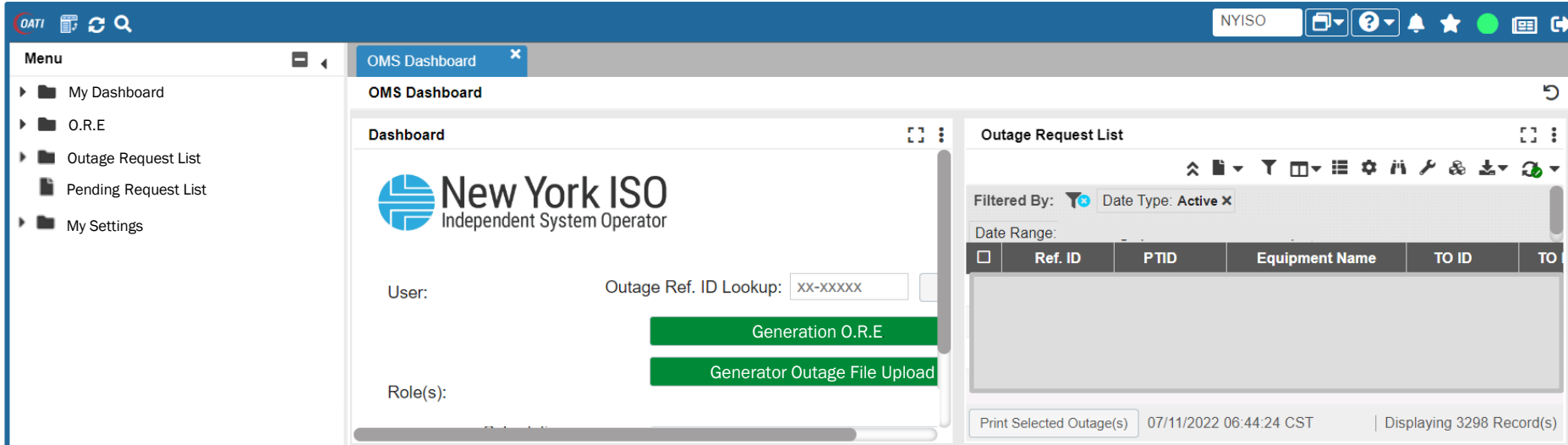
Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

OMS Dashboard



The screenshot shows the OMS Dashboard interface. The top navigation bar includes the OATI logo, a search icon, and the NYISO logo. The main content area is divided into two sections. The left section, titled "Dashboard", features the New York ISO logo and the text "Independent System Operator". Below this, there are input fields for "User:" and "Outage Ref. ID Lookup:" with a text box containing "XX-XXXXX". Two green buttons are visible: "Generation O.R.E" and "Generator Outage File Upload". The right section, titled "Outage Request List", contains a table with columns for "Ref. ID", "PTID", "Equipment Name", "TO ID", and "TO". The table is currently empty. Above the table, there are filters for "Filtered By:" (set to "Date Type: Active") and "Date Range:". At the bottom of the right section, there is a status bar showing "Print Selected Outage(s)", the current date and time "07/11/2022 06:44:24 CST", and "Displaying 3298 Record(s)".

OMS Dashboard



Menu

- My Dashboard
- O.R.E
- Outage Request List
- Pending Request List
- My Settings

OMS Dashboard

Dashboard

New York ISO
Independent System Operator

User: _____

Outage Ref. ID Lookup:

Generation O.R.E

Generator Outage File Upload

Role(s): _____

Outage Request List

Filtered By: Date Type: Active x

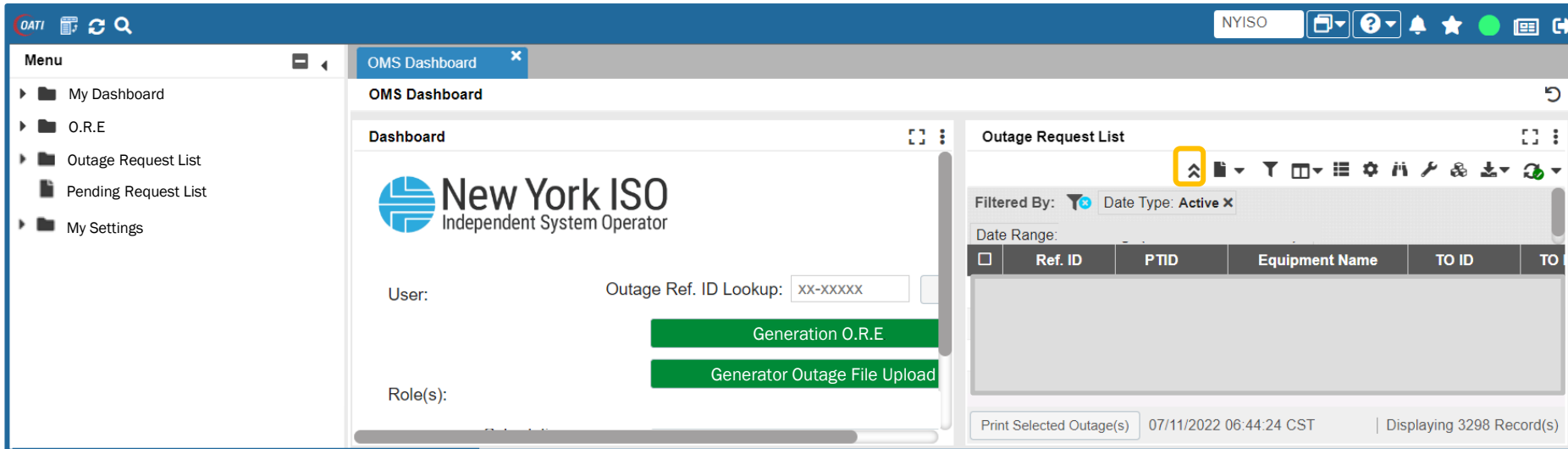
Date Range: _____

<input type="checkbox"/>	Ref. ID	PTID	Equipment Name	TO ID	TO
[Empty table body]					

Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

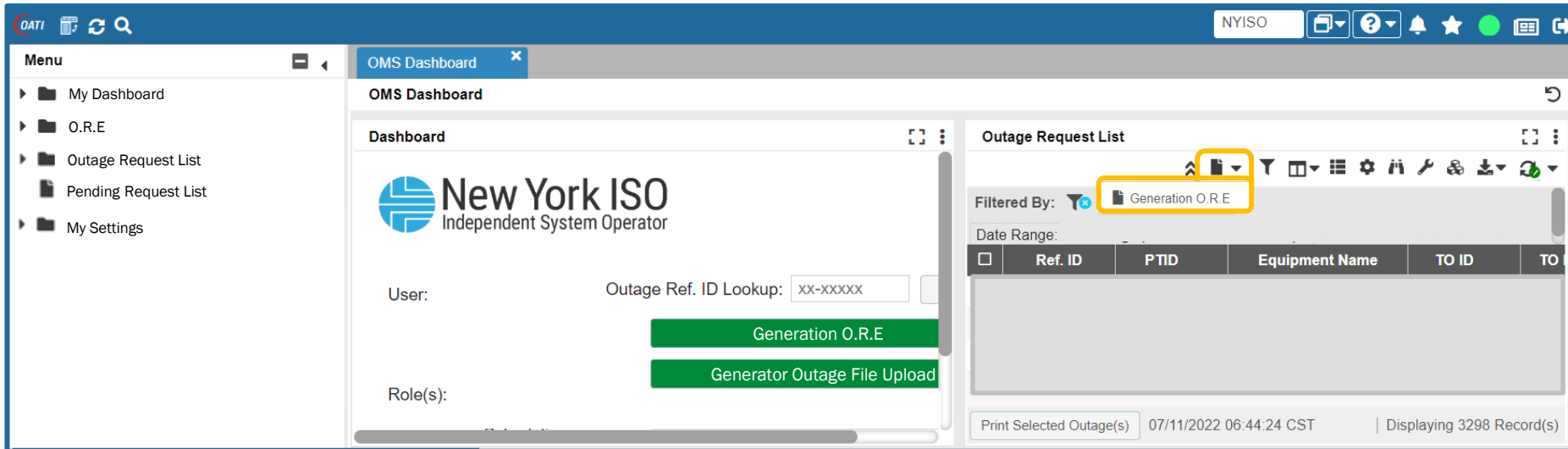
On this dashboard view, as well as the individual screens, there are buttons available to manipulate individual rows on the display

OMS Dashboard



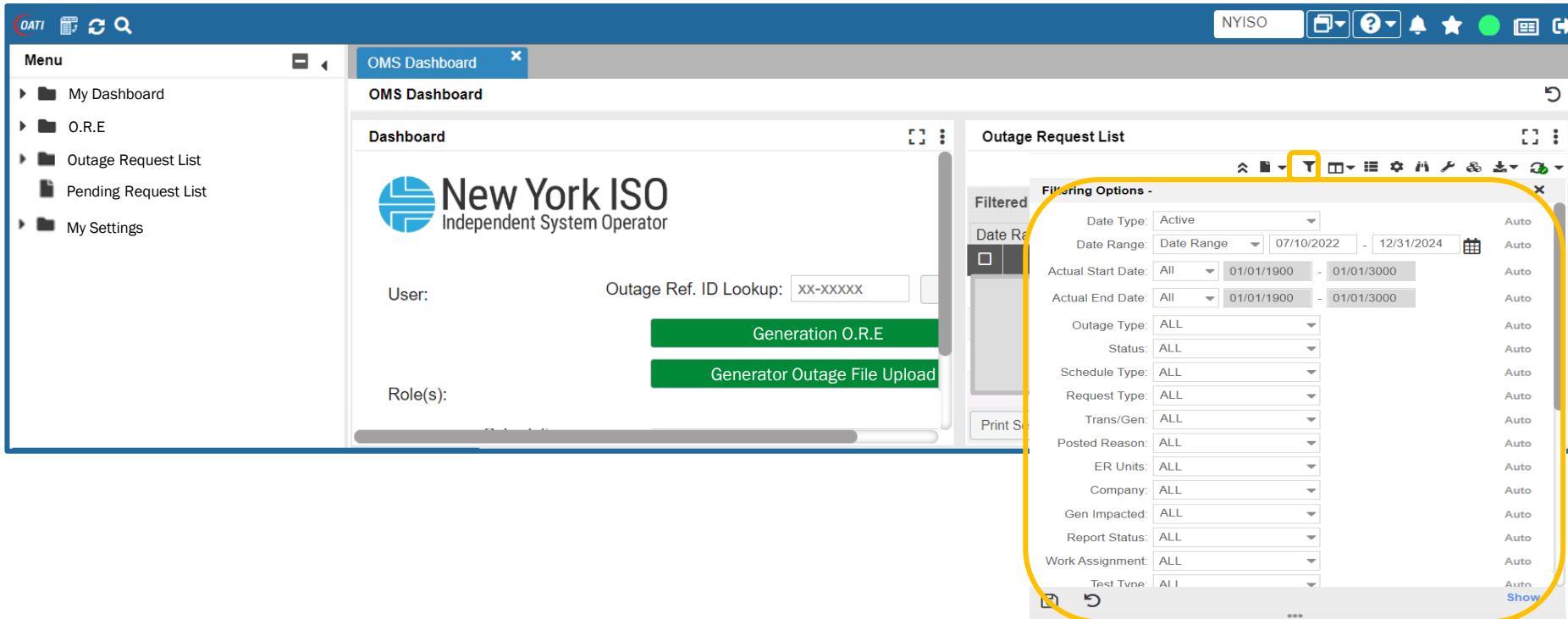
The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main content area is titled 'O.M.S. Dashboard' and features the New York ISO logo and 'Independent System Operator' text. Below this, there are input fields for 'User:' and 'Outage Ref. ID Lookup: xx-xxxxx', and two green buttons: 'Generation O.R.E' and 'Generator Outage File Upload'. On the right, the 'Outage Request List' panel is visible, showing a table with columns: Ref. ID, PTID, Equipment Name, TO ID, and TO. The table is currently empty. Above the table, there are filters: 'Filtered By: Date Type: Active' and 'Date Range:'. A yellow box highlights a small upward-pointing arrow icon in the toolbar above the table. At the bottom of the list panel, it says 'Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)'.

OMS Dashboard



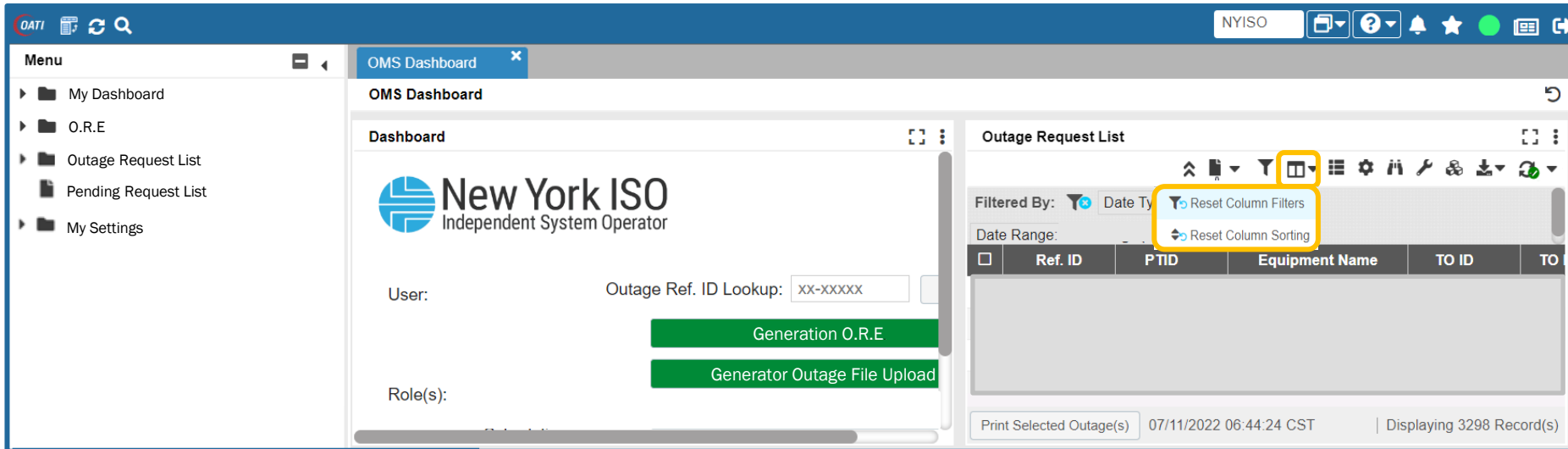
The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main content area is titled "O.R.E" and contains a "Dashboard" section with the New York ISO logo and the text "Independent System Operator". Below this are input fields for "User:" and "Outage Ref. ID Lookup:" (containing "xx-xxxxx"), and a "Role(s):" field. Two green buttons are visible: "Generation O.R.E" and "Generator Outage File Upload". On the right is the "Outage Request List" section, which is filtered by "Generation O.R.E" (highlighted with a yellow box). The list has columns for Ref. ID, PTID, Equipment Name, TO ID, and TO. The status bar at the bottom indicates "Print Selected Outage(s)", "07/11/2022 06:44:24 CST", and "Displaying 3298 Record(s)".

OMS Dashboard



The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main dashboard area features the New York ISO logo and the text "Independent System Operator". Below this, there are input fields for "User:" and "Outage Ref. ID Lookup:" (containing "XX-XXXXX"), and two green buttons: "Generation O.R.E" and "Generator Outage File Upload". On the right, the "Outage Request List" is shown with a "Filtering Options" dialog box open. The dialog box contains various filters such as Date Type, Date Range, Actual Start/End Dates, Outage Type, Status, Schedule Type, Request Type, Trans/Gen, Posted Reason, ER Units, Company, Gen Impacted, Report Status, Work Assignment, and Test Type. A yellow circle highlights the "Filtering Options" dialog box.

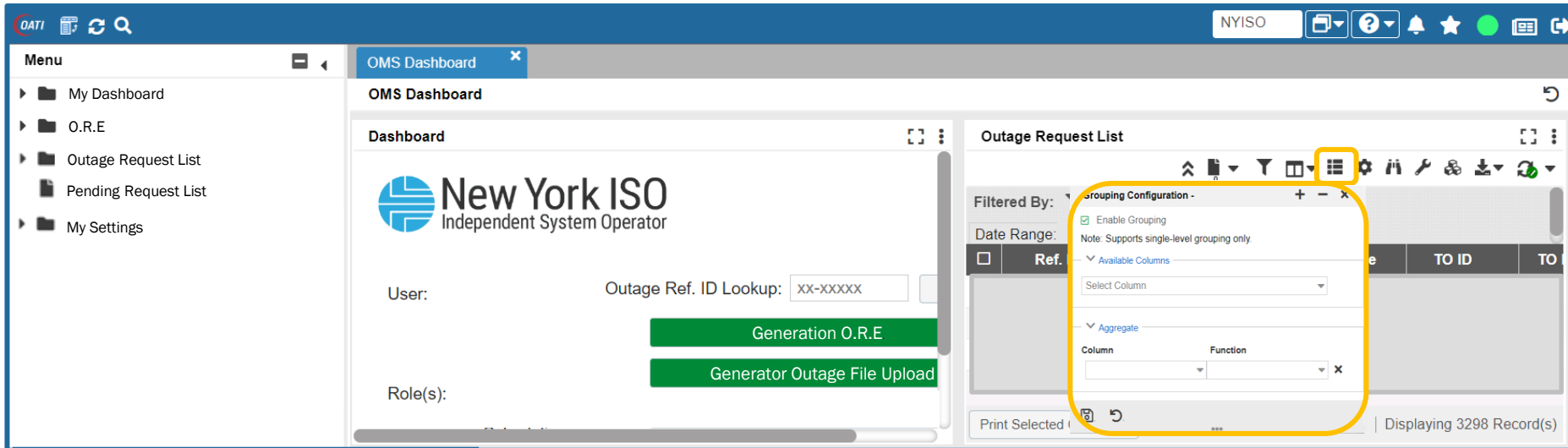
OMS Dashboard



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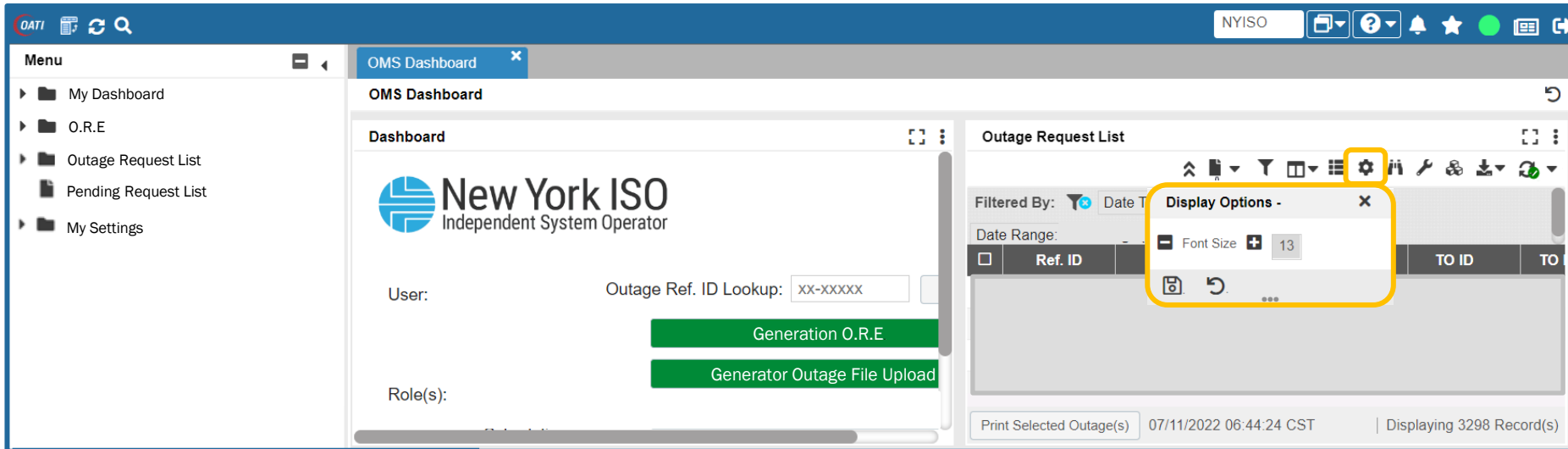
On the right, the "Outage Request List" is shown. It includes a toolbar with icons for sorting, filtering, and other actions. A yellow box highlights two options: "Reset Column Filters" and "Reset Column Sorting". Below the toolbar is a table with the following columns: Ref. ID, PTID, Equipment Name, TO ID, and TO. The table body is currently empty. At the bottom of the list, it shows "Print Selected Outage(s)", the current date and time "07/11/2022 06:44:24 CST", and "Displaying 3298 Record(s)".

OMS Dashboard



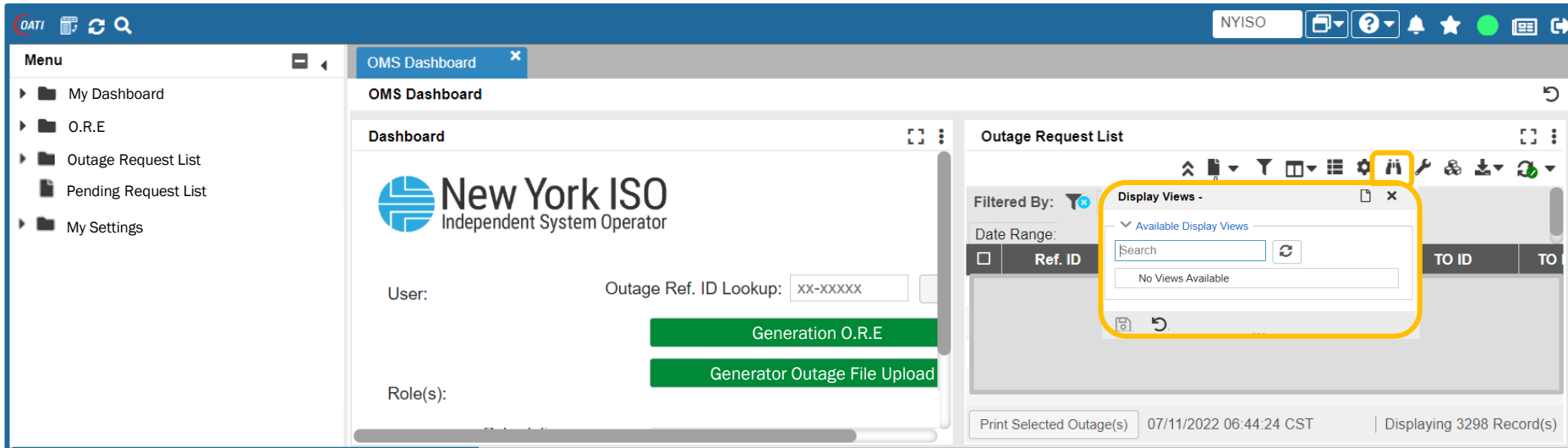
The screenshot displays the OMS Dashboard interface. On the left is a 'Menu' sidebar with options: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main dashboard area features the New York ISO logo and the text 'Independent System Operator'. Below this, there are input fields for 'User:' and 'Outage Ref. ID Lookup:' (containing 'XX-XXXXX'), and two green buttons: 'Generation O.R.E' and 'Generator Outage File Upload'. On the right, the 'Outage Request List' table is visible, with a 'Grouping Configuration' dialog box open over it. The dialog box has a title bar with '+', '-', and 'x' icons. It contains a checked 'Enable Grouping' checkbox, a note 'Note: Supports single-level grouping only.', an 'Available Columns' section with a 'Select Column' dropdown, and an 'Aggregate' section with 'Column' and 'Function' dropdowns. The table behind the dialog shows columns for 'Ref.', 'TO ID', and 'TO'. The status bar at the bottom right indicates 'Displaying 3298 Record(s)'.

OMS Dashboard



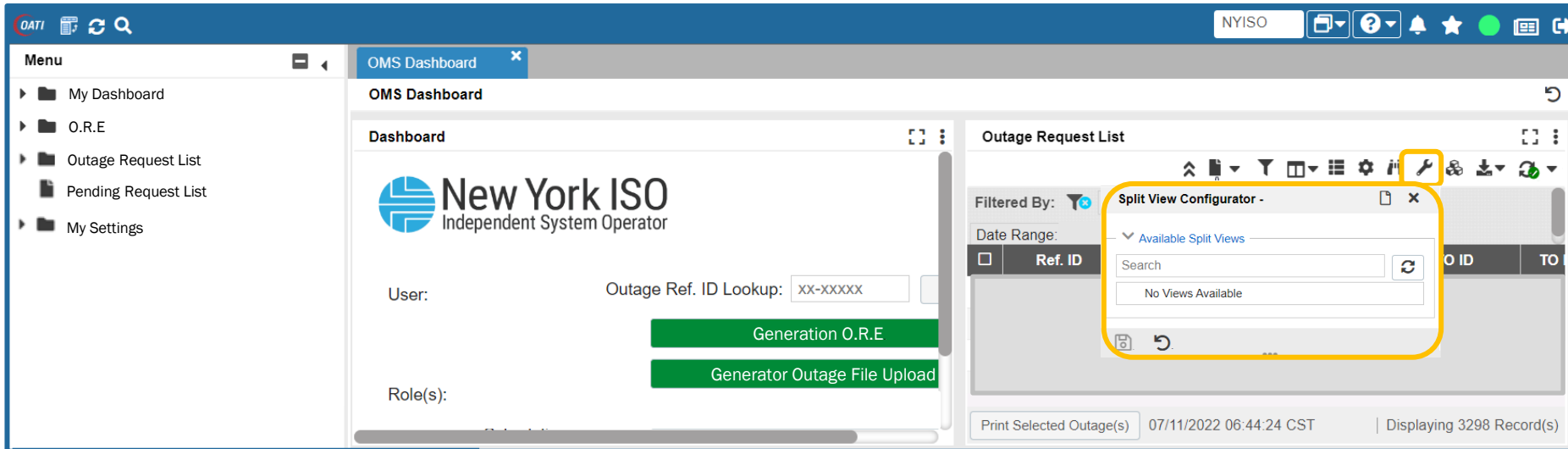
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OMS Dashboard



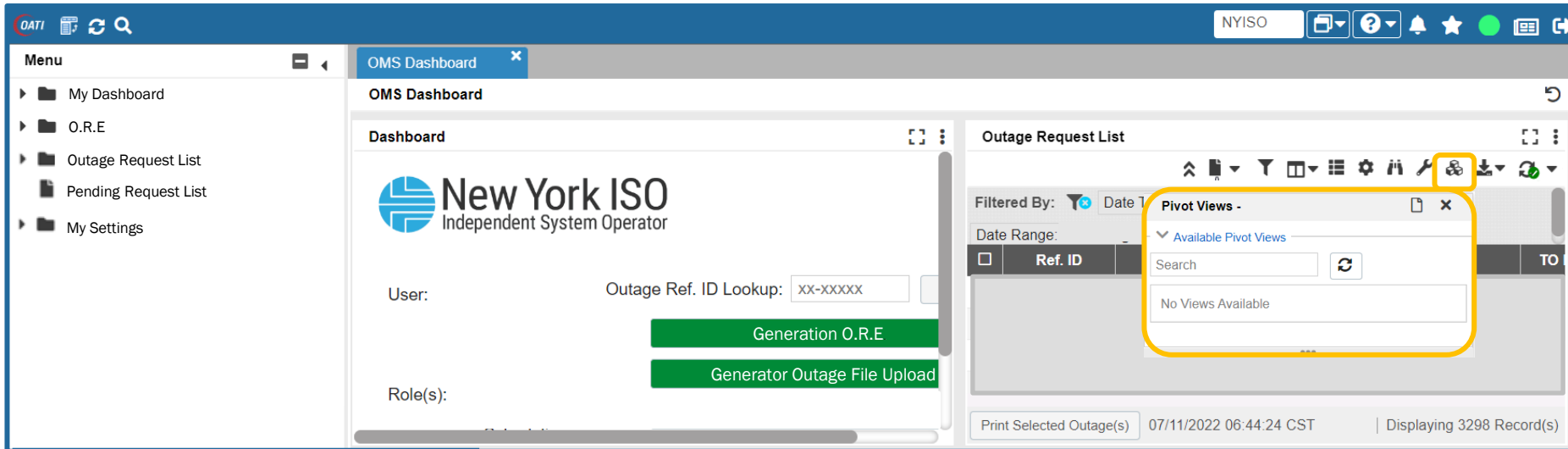
The screenshot displays the OMS Dashboard interface. On the left is a 'Menu' with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main area is titled 'O.M.S. Dashboard' and contains the New York ISO logo and 'Independent System Operator' text. Below this are fields for 'User:', 'Outage Ref. ID Lookup: xx-xxxxx', and 'Role(s):'. Two green buttons are visible: 'Generation O.R.E' and 'Generator Outage File Upload'. On the right, the 'Outage Request List' is shown with a 'Filtered By:' dropdown and a 'Date Range:' field. A 'Display Views' dialog box is open, showing 'Available Display Views' with a search bar and a 'No Views Available' message. The bottom of the interface includes a 'Print Selected Outage(s)' button, the date and time '07/11/2022 06:44:24 CST', and the text 'Displaying 3298 Record(s)'.

OMS Dashboard



The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main dashboard area features the New York ISO logo and the text "Independent System Operator". Below this, there are input fields for "User:" and "Outage Ref. ID Lookup:" (containing "xx-xxxxx"), and two green buttons: "Generation O.R.E" and "Generator Outage File Upload". On the right, the "Outage Request List" is visible, showing a table with columns "Ref. ID", "O ID", and "TO". A "Split View Configurator" dialog box is overlaid on the table, containing a search field and the text "No Views Available". The top right of the interface shows the "NYISO" label and various utility icons. At the bottom right, there is a status bar with "Print Selected Outage(s)", "07/11/2022 06:44:24 CST", and "Displaying 3298 Record(s)".

OMS Dashboard



Menu

- My Dashboard
- O.R.E
- Outage Request List
- Pending Request List
- My Settings

OMS Dashboard

Dashboard

New York ISO
Independent System Operator

User: _____

Outage Ref. ID Lookup:

[Generation O.R.E](#)

[Generator Outage File Upload](#)

Role(s): _____

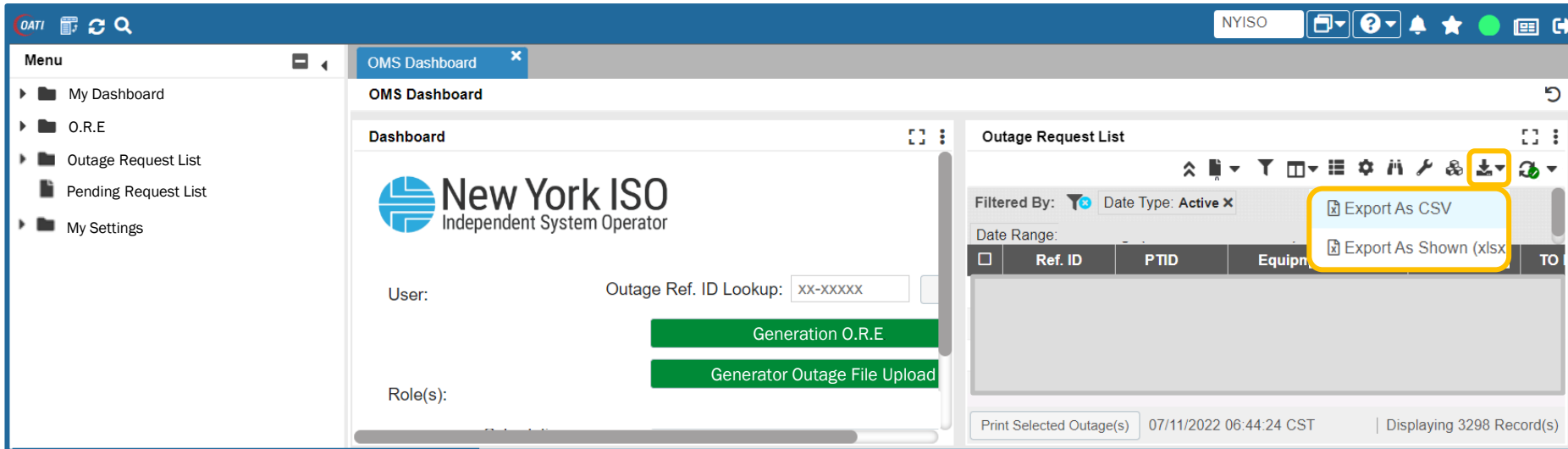
Outage Request List

Filtered By: Date Range: _____

<input type="checkbox"/>	Ref. ID	TO
No Views Available		

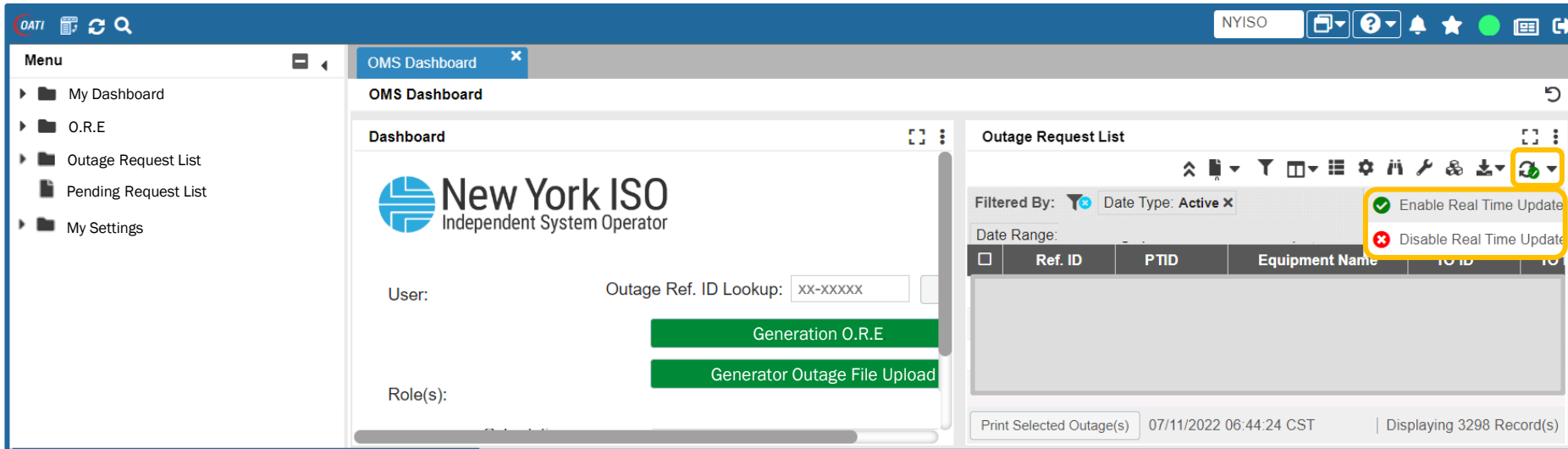
Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

OMS Dashboard



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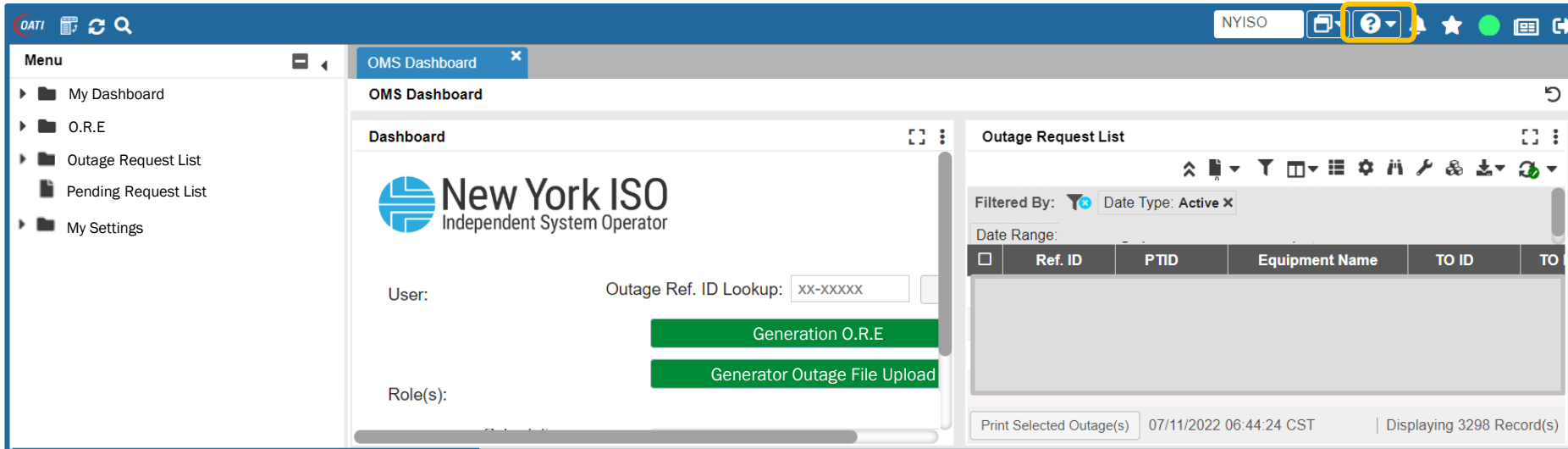
OMS Dashboard



The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E, Outage Request List, Pending Request List, and My Settings. The main content area is titled "Oms Dashboard" and features the New York ISO logo and "Independent System Operator" text. Below this, there are input fields for "User:" and "Outage Ref. ID Lookup:" (containing "xx-xxxxx"), and a "Role(s):" field. Two green buttons are visible: "Generation O.R.E" and "Generator Outage File Upload".

On the right, the "Outage Request List" is shown. It includes a toolbar with a refresh icon (highlighted in a yellow box) and two options: "Enable Real Time Update" (checked) and "Disable Real Time Update" (unchecked). The list is filtered by "Date Type: Active" and has a "Date Range:" field. The table header includes "Ref. ID", "PTID", and "Equipment Name". At the bottom, it shows "Print Selected Outage(s)", the timestamp "07/11/2022 06:44:24 CST", and "Displaying 3298 Record(s)".

OMS Dashboard



Menu

- My Dashboard
- O.R.E
- Outage Request List
- Pending Request List
- My Settings

OMS Dashboard

Dashboard

New York ISO
Independent System Operator

User: _____

Outage Ref. ID Lookup:

Generation O.R.E

Generator Outage File Upload

Role(s): _____

Outage Request List

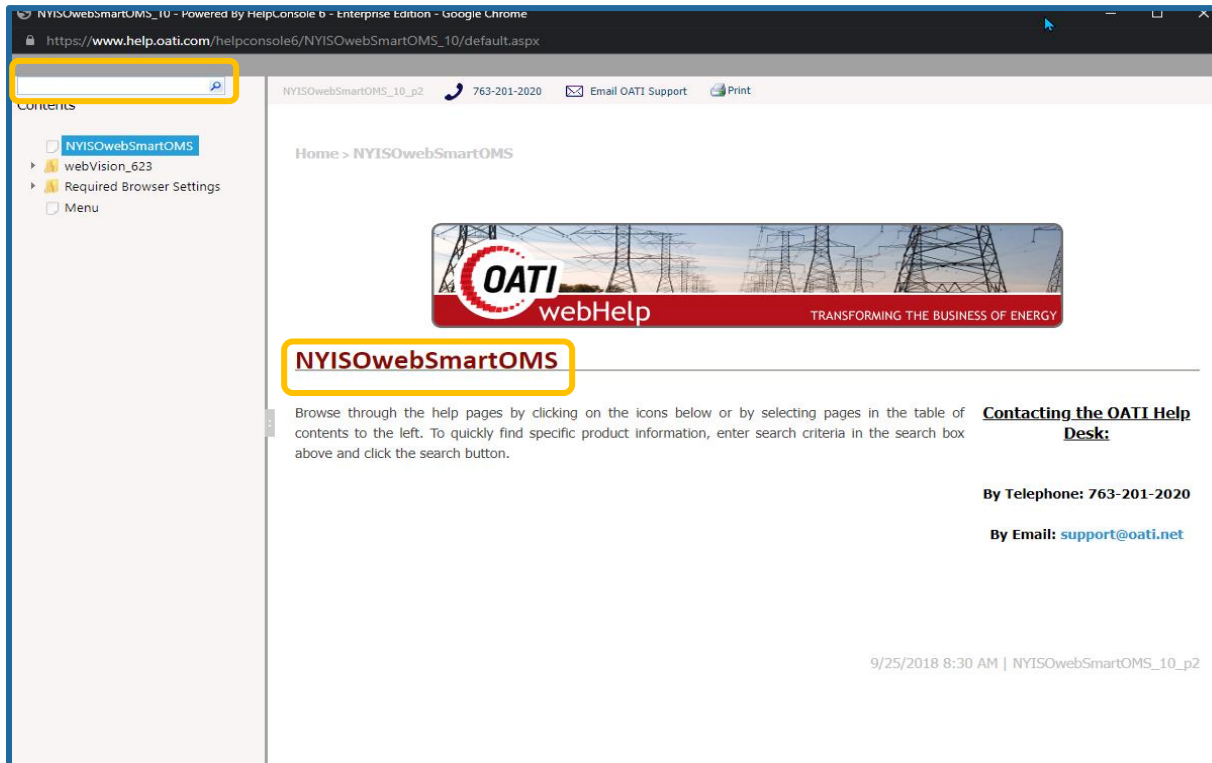
Filtered By: Date Type: Active

Date Range: _____

<input type="checkbox"/>	Ref. ID	PTID	Equipment Name	TO ID	TO
[Empty Table Body]					

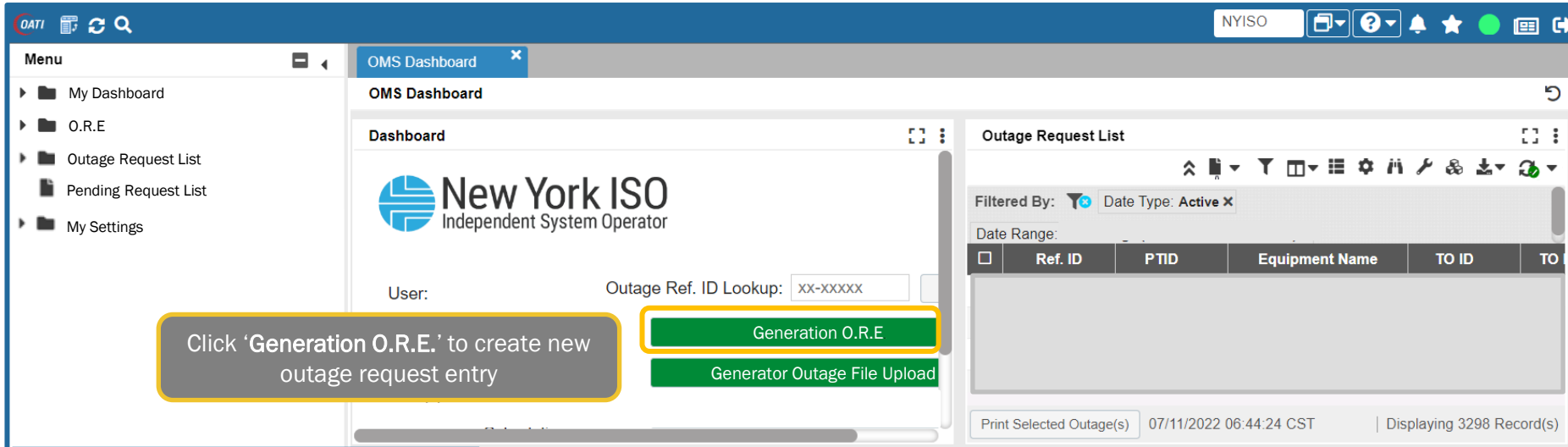
Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)

OMS Dashboard



The screenshot shows a web browser window titled "NYISOWebSmartOMS_10 - Powered by HelpConsole 6 - Enterprise Edition - Google Chrome". The address bar shows the URL "https://www.help.oati.com/helpconsole6/NYISOWebSmartOMS_10/default.aspx". A search bar is highlighted with a yellow box. The page content includes a navigation menu on the left with items like "NYISOWebSmartOMS", "webVision_623", "Required Browser Settings", and "Menu". The main content area features a banner for "OATI webHelp" with the tagline "TRANSFORMING THE BUSINESS OF ENERGY". Below the banner, the text "NYISOWebSmartOMS" is highlighted with a yellow box. The page provides instructions on how to browse help pages and contact the OATI Help Desk. Contact information includes a telephone number (763-201-2020) and an email address (support@oati.net). The footer shows the date and time: "9/25/2018 8:30 AM | NYISOWebSmartOMS_10_p2".

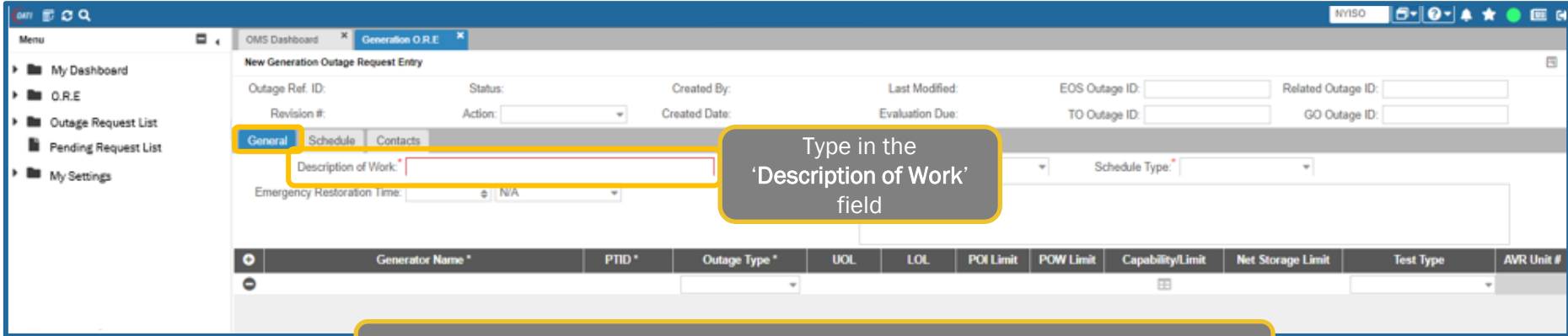
Creating an Outage Request



The screenshot displays the OMS Dashboard interface. On the left is a navigation menu with items: My Dashboard, O.R.E., Outage Request List, Pending Request List, and My Settings. The main content area shows the New York ISO logo and the text 'Independent System Operator'. Below this, there are input fields for 'User:' and 'Outage Ref. ID Lookup: xx-xxxxx'. Two buttons are visible: 'Generation O.R.E.' and 'Generator Outage File Upload'. The 'Generation O.R.E.' button is highlighted with a yellow border. A callout box with a yellow border and a grey background contains the text: 'Click 'Generation O.R.E.' to create new outage request entry'. On the right side, there is an 'Outage Request List' section with a table header containing columns: Ref. ID, PTID, Equipment Name, TO ID, and TO. The table body is currently empty. Above the table, there are filters for 'Filtered By: Date Type: Active' and 'Date Range:'. At the bottom of the list, it shows 'Print Selected Outage(s) 07/11/2022 06:44:24 CST | Displaying 3298 Record(s)'.

Creating an Outage Request

General Tab



OMS Dashboard | Generation O.R.E.

New Generation Outage Request Entry

Outage Ref. ID: _____ Status: _____ Created By: _____ Last Modified: _____ EOS Outage ID: _____ Related Outage ID: _____
Revision #: _____ Action: _____ Created Date: _____ Evaluation Due: _____ TO Outage ID: _____ GO Outage ID: _____

General | Schedule | Contacts

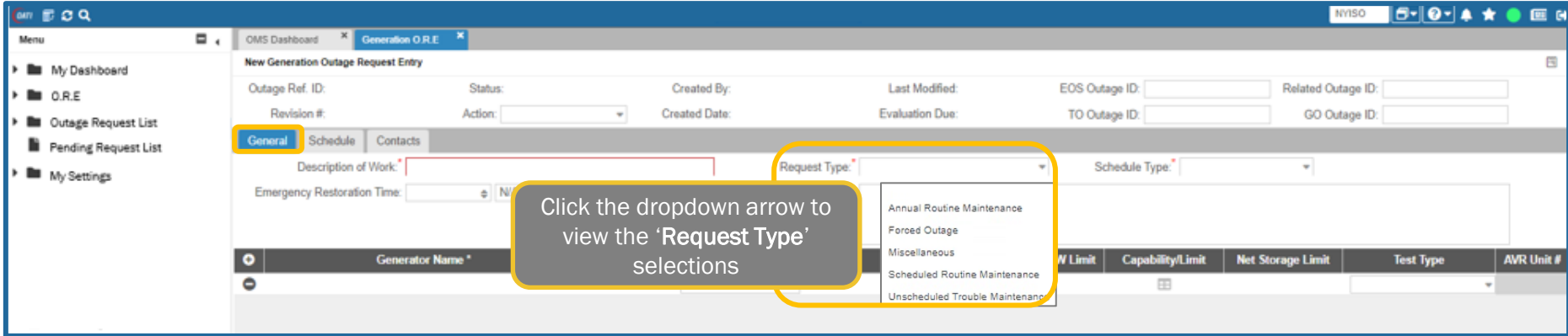
Description of Work: * _____ Schedule Type: _____
Emergency Restoration Time: _____ N/A

Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #

Required fields are noted with a red asterisk *

Creating an Outage Request

General Tab



OMS Dashboard | Generation O.R.E.

New Generation Outage Request Entry

Outage Ref. ID: _____ Status: _____ Created By: _____ Last Modified: _____ EOS Outage ID: Related Outage ID:
Revision #: _____ Action: Created Date: _____ Evaluation Due: _____ TO Outage ID: GO Outage ID:

General | Schedule | Contacts

Description of Work: Request Type: Schedule Type:

Emergency Restoration Time: N/A

Generator Name:

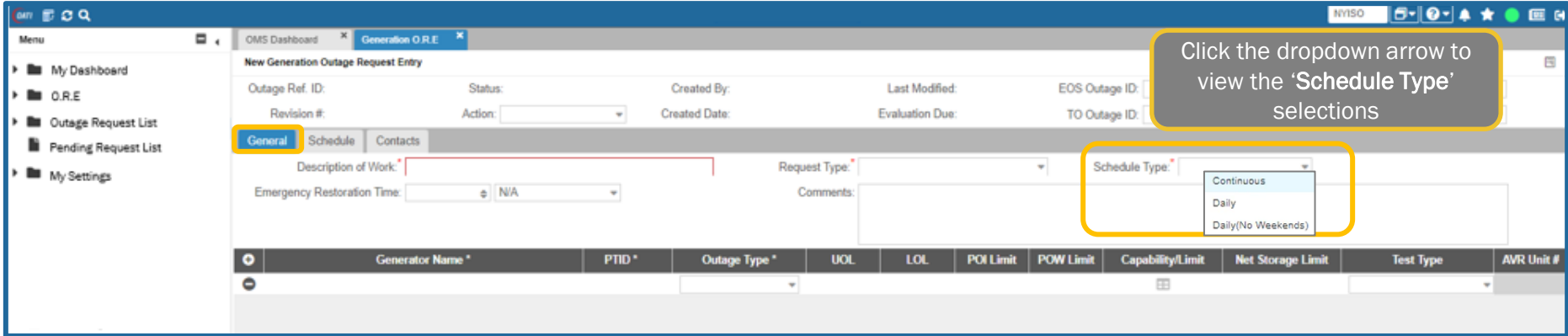
W Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #

Request Type dropdown options:
Annual Routine Maintenance
Forced Outage
Miscellaneous
Scheduled Routine Maintenance
Unscheduled Trouble Maintenance

Click the dropdown arrow to view the 'Request Type' selections

Creating an Outage Request

General Tab



Click the dropdown arrow to view the 'Schedule Type' selections

General | Schedule | Contacts

Description of Work: *
Emergency Restoration Time: [N/A]

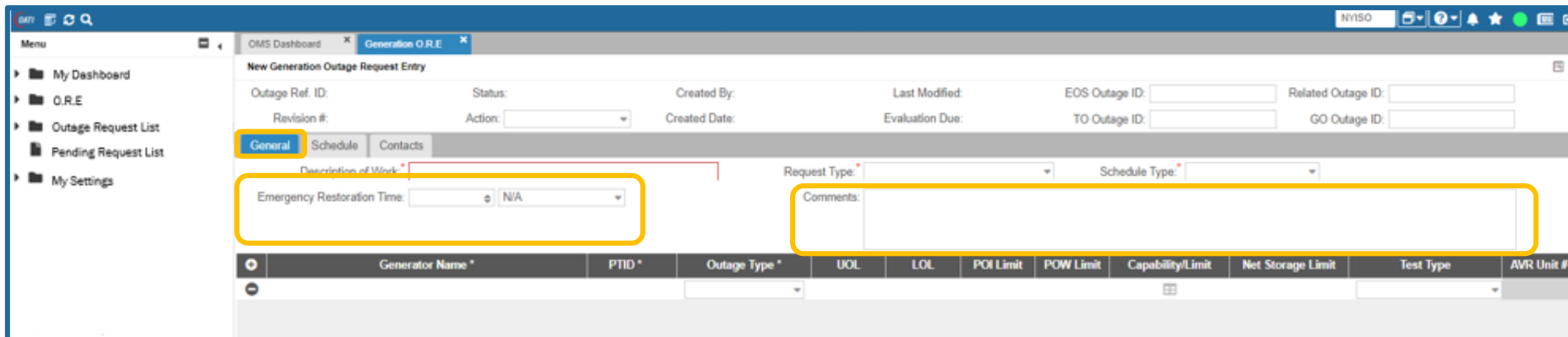
Request Type: *
Comments:

Schedule Type: *
Continuous
Daily
Daily(No Weekends)

Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #

Creating an Outage Request

General Tab



OMS Dashboard | Generation O.R.E.

New Generation Outage Request Entry

Outage Ref. ID: _____ Status: _____ Created By: _____ Last Modified: _____ EOS Outage ID: _____ Related Outage ID: _____
 Revision #: _____ Action: _____ Created Date: _____ Evaluation Due: _____ TO Outage ID: _____ GO Outage ID: _____

General | Schedule | Contacts

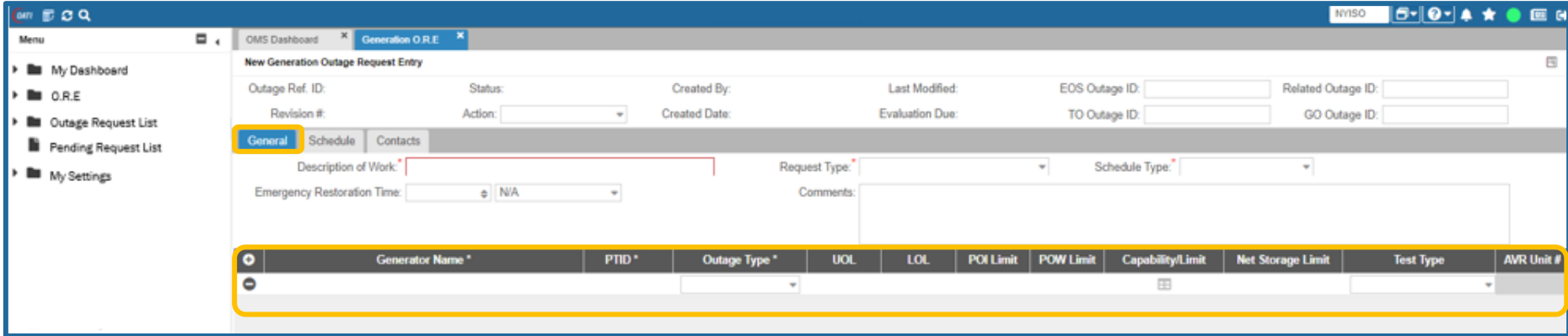
Description of Work: _____ Request Type: _____ Schedule Type: _____
 Emergency Restoration Time: _____ N/A _____ Comments: _____

Generator Name *	PTID *	Outage Type *	UOL	LOL	POI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #

Although 'Emergency Restoration Time,' and 'Comments' fields are not required, entering this level of detail on an outage request may be helpful.

Creating an Outage Request

General Tab



The screenshot shows the 'New Generation Outage Request Entry' form in the OMS Dashboard. The 'General' tab is selected, and a yellow box highlights the 'Generator Name' field in the table below. The form includes various input fields for identification, status, and scheduling, as well as a table for generator-specific parameters.

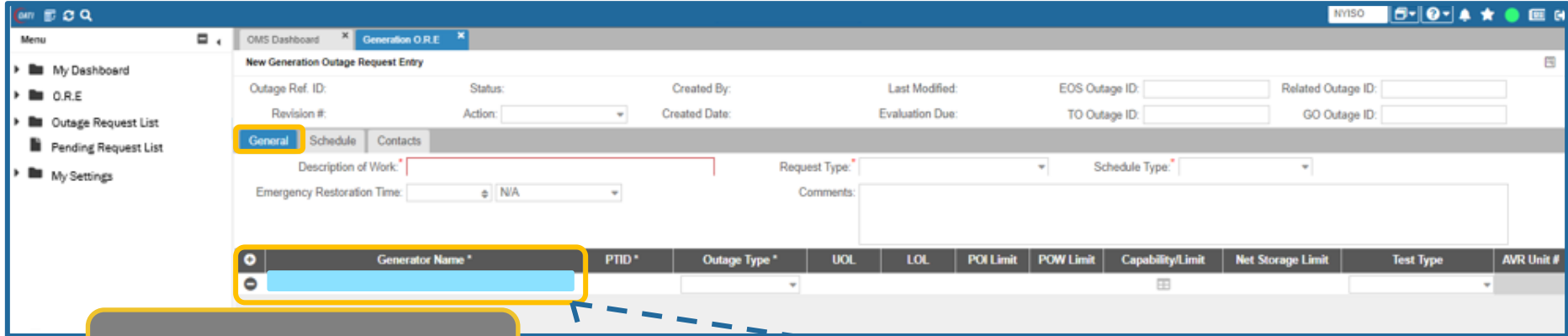
Form Fields:

- Outage Ref. ID:
- Status:
- Created By:
- Last Modified:
- EOS Outage ID:
- Related Outage ID:
- Revision #:
- Action:
- Created Date:
- Evaluation Due:
- TO Outage ID:
- GO Outage ID:
- Description of Work:
- Request Type:
- Schedule Type:
- Emergency Restoration Time: N/A
- Comments:

Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Creating an Outage Request

General Tab



Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #
<input type="text"/>										

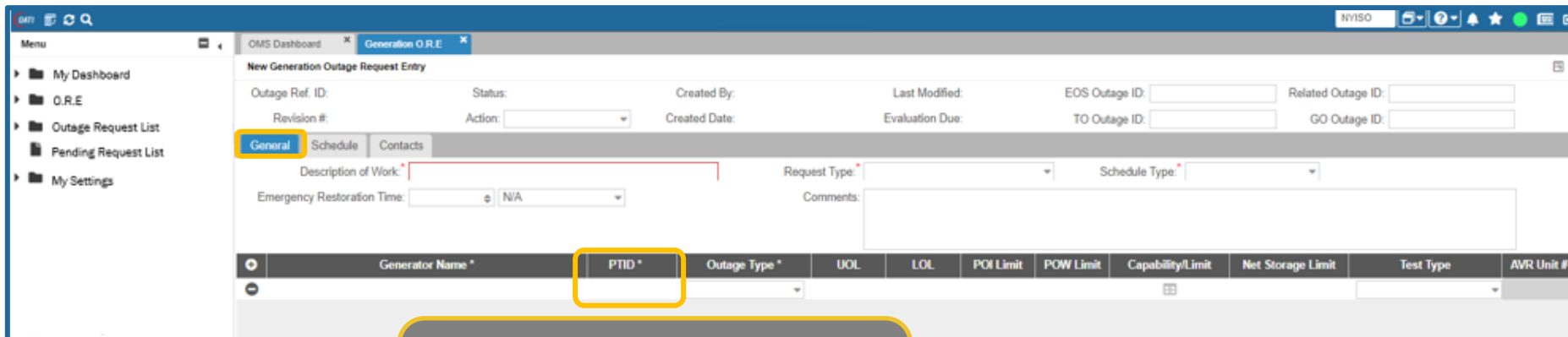
Hover the cursor in the first box under the column 'Generator Name'

Generator Name Selection *

Click the dropdown arrow to view and select the applicable generator for this outage request.

Creating an Outage Request

General Tab



New Generation Outage Request Entry

Outage Ref. ID: _____ Status: _____ Created By: _____ Last Modified: _____ EOS Outage ID: Related Outage ID:

Revision #: _____ Action: Created Date: _____ Evaluation Due: _____ TO Outage ID: GO Outage ID:

General | Schedule | Contacts

Description of Work: Request Type: Schedule Type:

Emergency Restoration Time: N/A

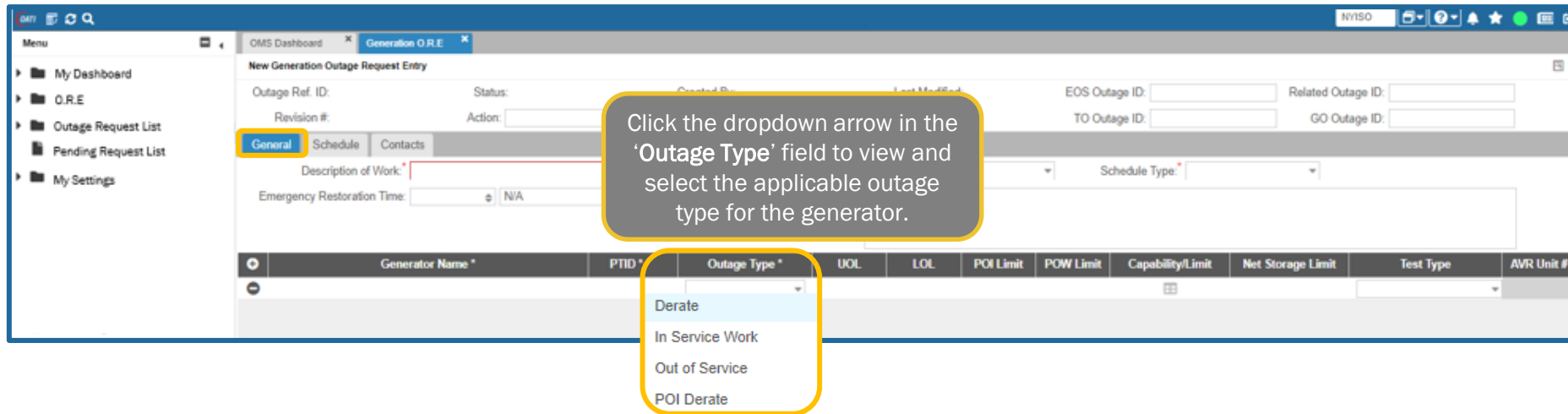
Comments:

Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

This 'PTID' field will be automatically updated once the 'Generator Name' is entered. Or, you can type in the PTID and the 'Generator Name' will be populated.

Creating an Outage Request

General Tab



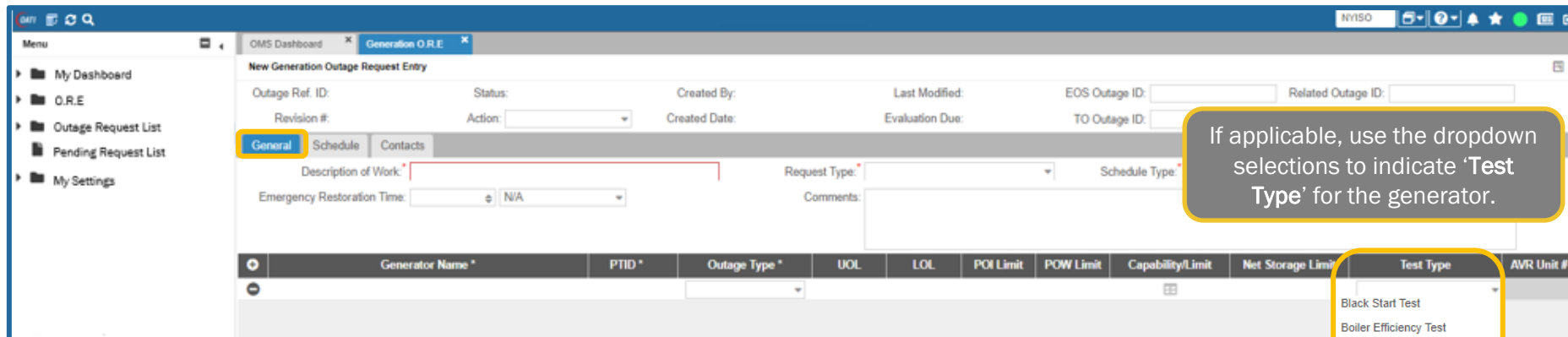
Click the dropdown arrow in the 'Outage Type' field to view and select the applicable outage type for the generator.

Generator Name *	PTID *	Outage Type *	UOL	LOL	POI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #
		Derate								
		In Service Work								
		Out of Service								
		POI Derate								

Based on the 'Outage Type' selected, it may be required to fill out additional information
i.e. By selecting Derate, the columns UOL and LOL would be required.

Creating an Outage Request

General Tab



New Generation Outage Request Entry

Outage Ref. ID: _____ Status: _____ Created By: _____ Last Modified: _____ EOS Outage ID: _____ Related Outage ID: _____

Revision #: _____ Action: _____ Created Date: _____ Evaluation Due: _____ TO Outage ID: _____

General | Schedule | Contacts

Description of Work: _____ Request Type: _____ Schedule Type: _____

Emergency Restoration Time: _____ N/A

Comments: _____

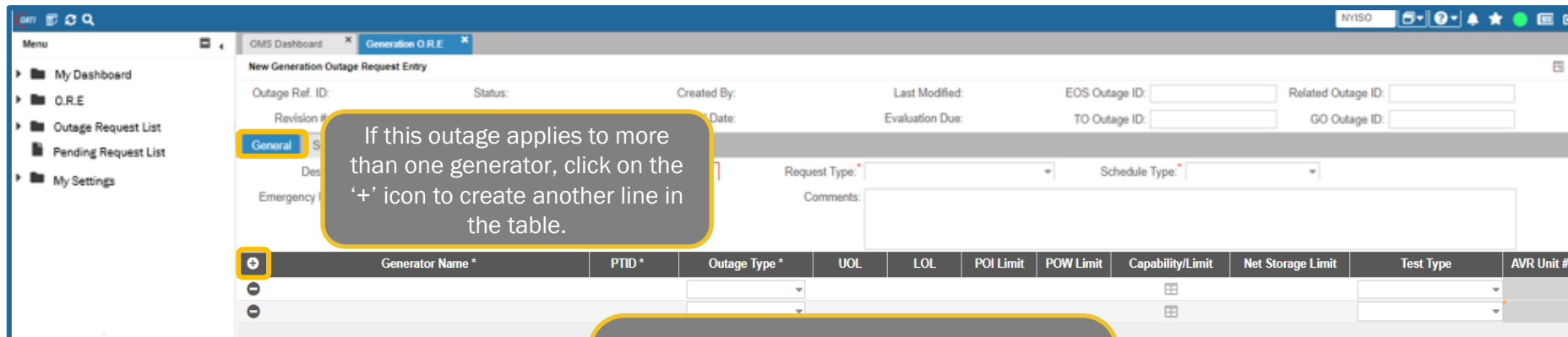
Generator Name *	PTID *	Outage Type *	UOL	LOL	PCI Limit	POW Limit	Capability Limit	Net Storage Limit	Test Type	AVR Unit #

If applicable, use the dropdown selections to indicate 'Test Type' for the generator.

- Black Start Test
- Boiler Efficiency Test
- DMNC Test
- Full Load Fuel Oil Test
- Generator Test - Other
- GT Monthly OP Test
- Mill Fitness Check
- N2 Leakage Test
- NOx test
- Particulate test
- RATA Test
- Reheat Int/Shop Vlv Leak Test
- VAR Test

Creating an Outage Request

General Tab

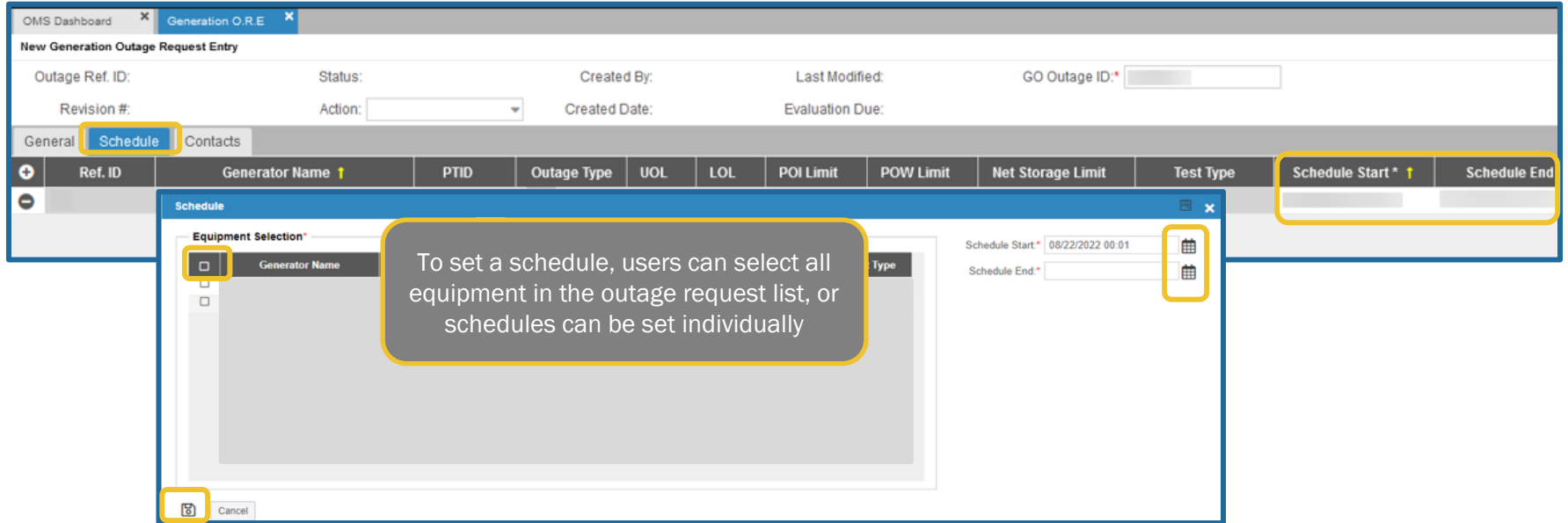


If this outage applies to more than one generator, click on the '+' icon to create another line in the table.

+	Generator Name *	PTID *	Outage Type *	UOL	LOL	POI Limit	POW Limit	Capability/Limit	Net Storage Limit	Test Type	AVR Unit #
-											
-											

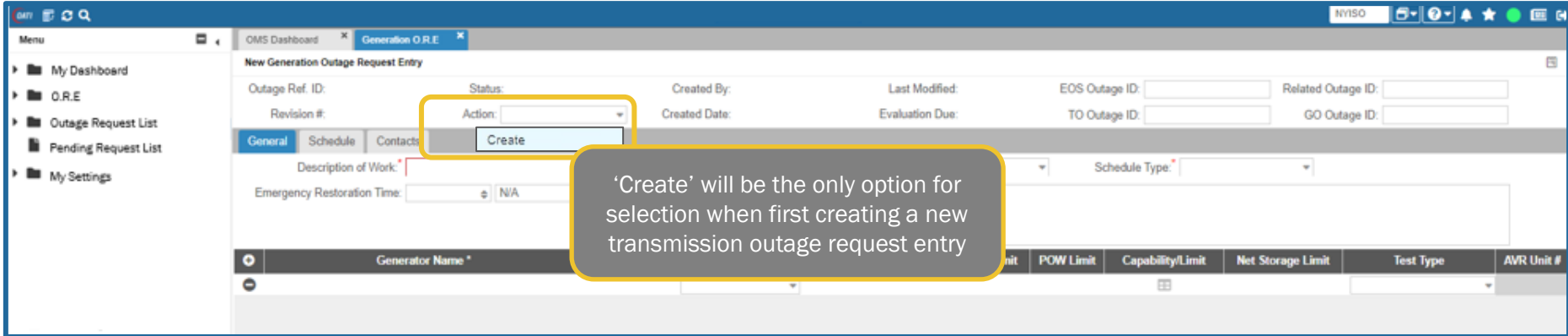
Once another line has been added, type in and make the applicable selections needed for that generator for this outage request starting with 'Generator Name.' Remember that 'Generator Name' and 'Outage Type' are required fields.

Creating an Outage Request Schedule Tab



The screenshot displays the 'New Generation Outage Request Entry' form in the OMS Dashboard. The 'Schedule' tab is active, showing a table with columns for Ref. ID, Generator Name, PTID, Outage Type, UOL, LOL, POI Limit, POW Limit, Net Storage Limit, Test Type, Schedule Start, and Schedule End. A modal window titled 'Schedule' is open, featuring an 'Equipment Selection' section with a list of generators and checkboxes. A text box within the modal states: 'To set a schedule, users can select all equipment in the outage request list, or schedules can be set individually'. The modal also includes 'Schedule Start' and 'Schedule End' fields with calendar icons, and a 'Cancel' button.

Creating an Outage Request General and/or Schedule Tab



The screenshot displays the 'New Generation Outage Request Entry' form in the NYISO OMS Dashboard. The form includes fields for 'Outage Ref. ID', 'Status', 'Created By', 'Last Modified', 'EOS Outage ID', and 'Related Outage ID'. A yellow box highlights the 'Action' dropdown menu, which contains the 'Create' option. A callout box points to this menu with the text: 'Create' will be the only option for selection when first creating a new transmission outage request entry. The form also features tabs for 'General', 'Schedule', and 'Contacts', and a 'Description of Work' field.

Creating an Outage Request

General and/or Schedule Tab

New Generation Outage Request Entry

Outage Ref. ID: Status: Created By: Last Modified: GO Outage ID:

Revision #: Action: Created Date: Evaluation Due:

General Schedule Contacts Audit Trail

Description of Work: Request Type: Schedule Type: Emergency Restoration Time: N/A

Emergency Restoration Time: N/A Requested By: Work Assignment:

Comments:

Print

Generator Name *	PTID *	Outage Type *	UOL	LOL	POI Limit	POW Limit	Capability/Limit	Net Storage Limit	Test Type	AVR Unit

Copy

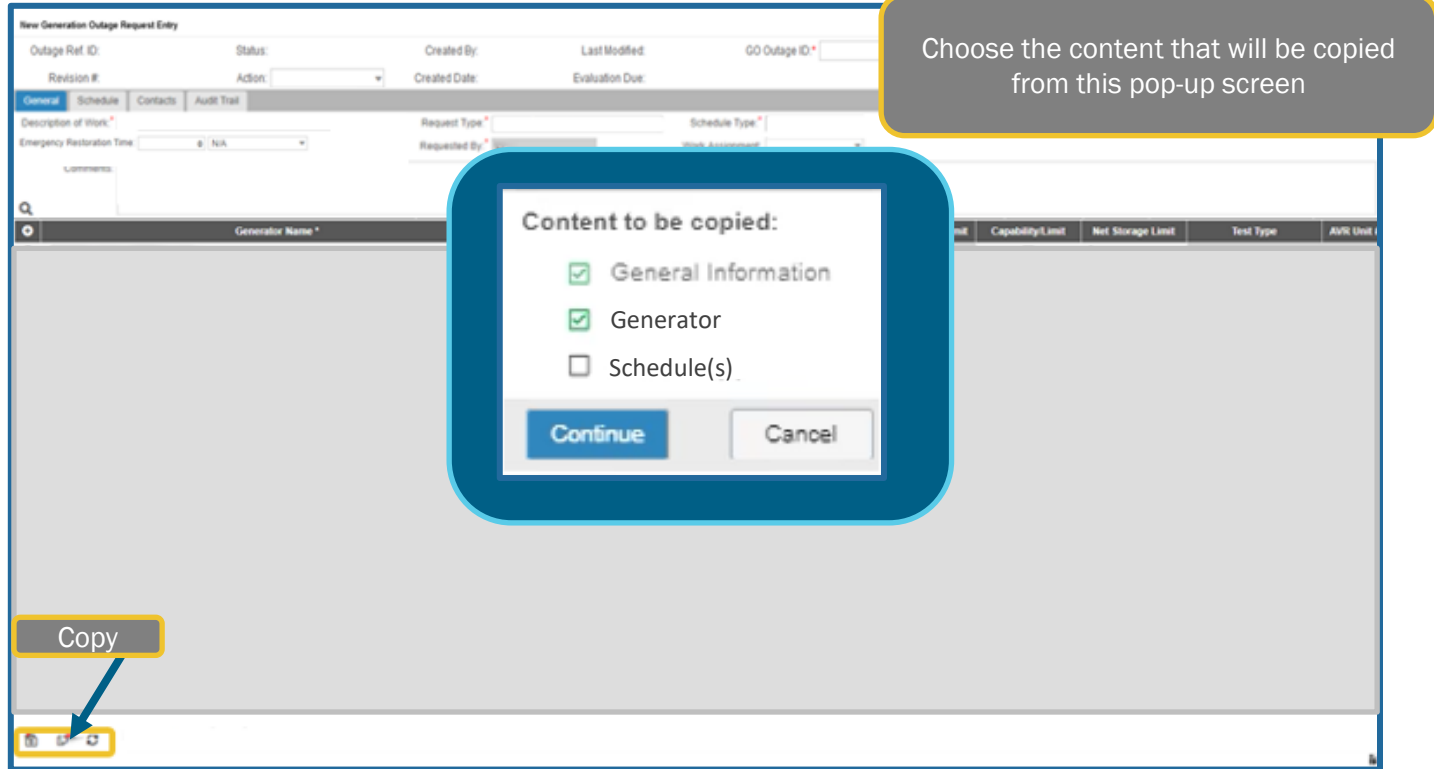
Save

Refresh

Note that the following options will appear once the required fields on both General and Schedule tabs are complete, and the request has been Created:

- Save
- Refresh
- Print to File
- Copy

Creating an Outage Request General and/or Schedule Tab



The screenshot shows the 'New Generation Outage Request Entry' form. A pop-up dialog titled 'Content to be copied:' is centered on the screen. The dialog contains three items with checkboxes: 'General Information' (checked), 'Generator' (checked), and 'Schedule(s)' (unchecked). Below the list are 'Continue' and 'Cancel' buttons. A yellow callout box in the top right of the form area contains the text 'Choose the content that will be copied from this pop-up screen'. A blue callout box highlights the pop-up dialog. A yellow callout box labeled 'Copy' with an arrow points to a small icon in the bottom left corner of the form.

Choose the content that will be copied from this pop-up screen

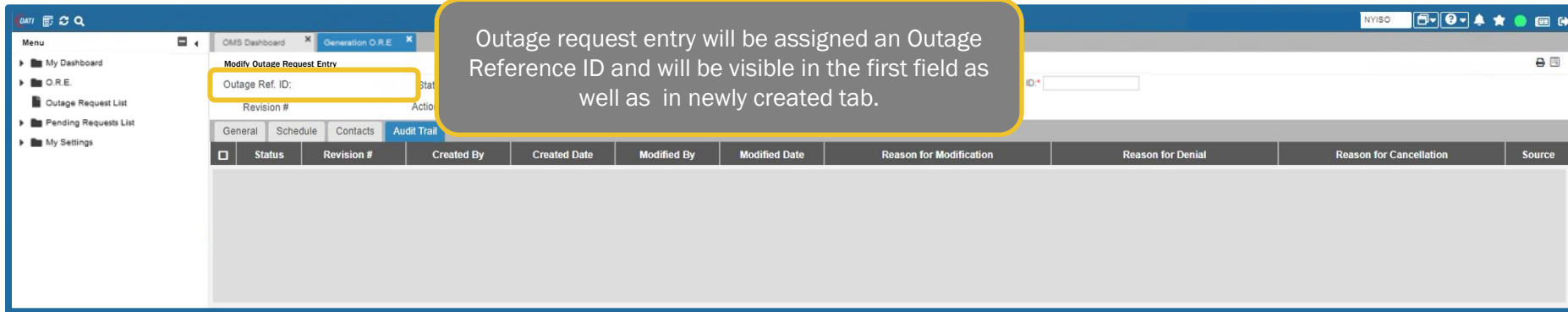
Content to be copied:

- General Information
- Generator
- Schedule(s)

Continue Cancel

Copy

Submitting a Request

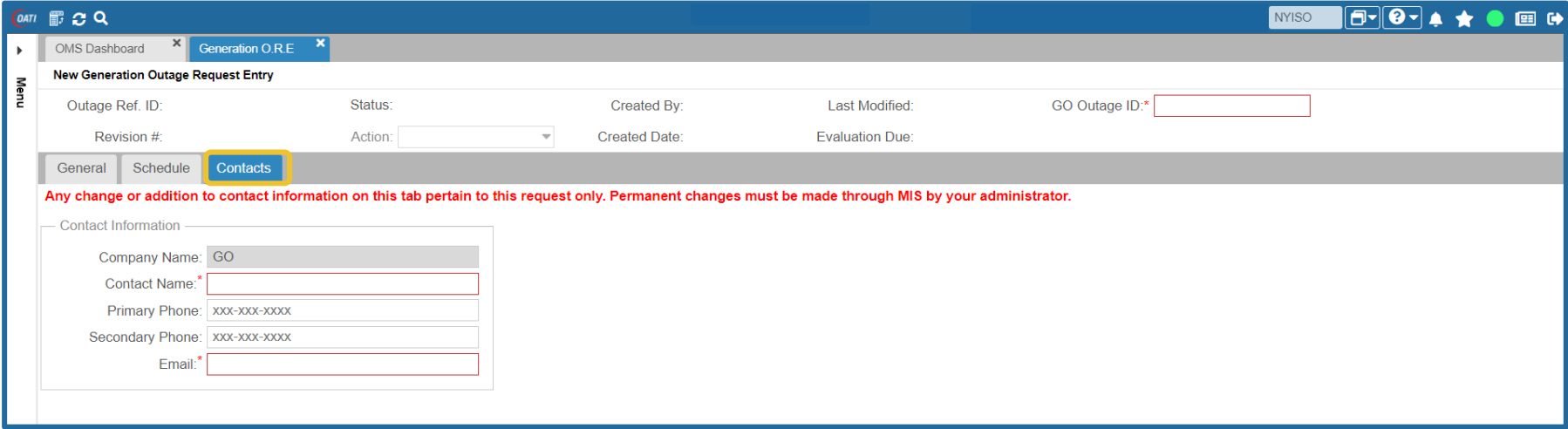


Outage request entry will be assigned an Outage Reference ID and will be visible in the first field as well as in newly created tabs.

Status	Revision #	Created By	Created Date	Modified By	Modified Date	Reason for Modification	Reason for Denial	Reason for Cancellation	Source
--------	------------	------------	--------------	-------------	---------------	-------------------------	-------------------	-------------------------	--------

Submitting a Request

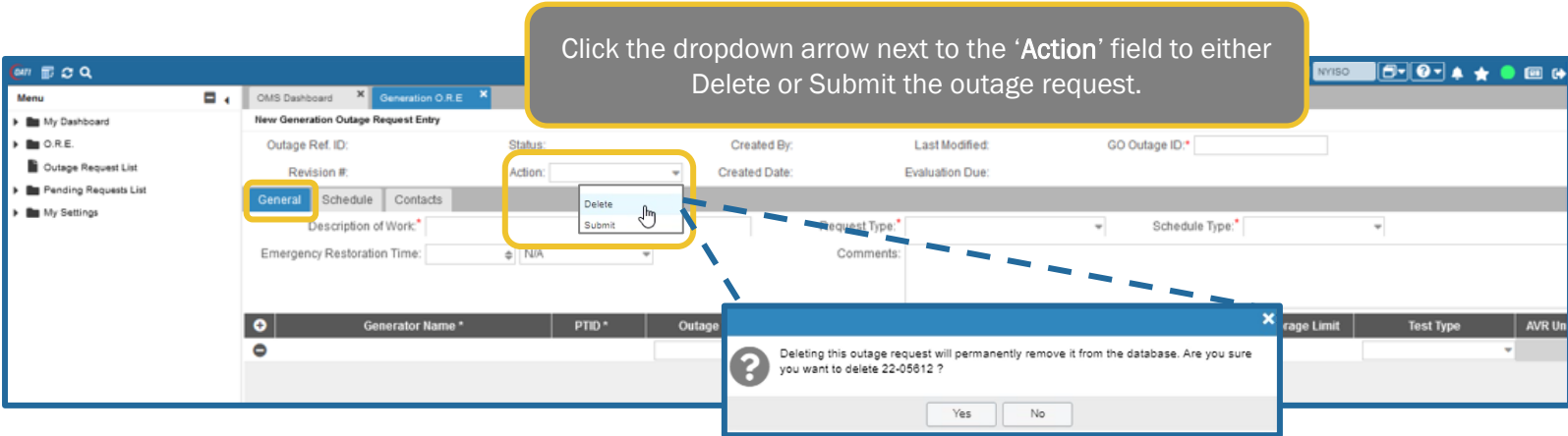
Contacts Tab



The screenshot shows a web browser window with the OATS application. The browser tabs include 'OATS Dashboard' and 'Generation O.R.E.'. The page title is 'New Generation Outage Request Entry'. The form contains several fields: 'Outage Ref. ID:', 'Status:', 'Created By:', 'Last Modified:', 'GO Outage ID:*' (with a red border), 'Revision #:', 'Action:' (dropdown), 'Created Date:', and 'Evaluation Due:'. Below these fields are three tabs: 'General', 'Schedule', and 'Contacts' (which is highlighted with a yellow box). A red warning message states: 'Any change or addition to contact information on this tab pertain to this request only. Permanent changes must be made through MIS by your administrator.' Under the 'Contact Information' section, there are five input fields: 'Company Name:' (pre-filled with 'GO'), 'Contact Name:*' (with a red border), 'Primary Phone:' (with a placeholder 'xxx-xxx-xxxx'), 'Secondary Phone:' (with a placeholder 'xxx-xxx-xxxx'), and 'Email:*' (with a red border).

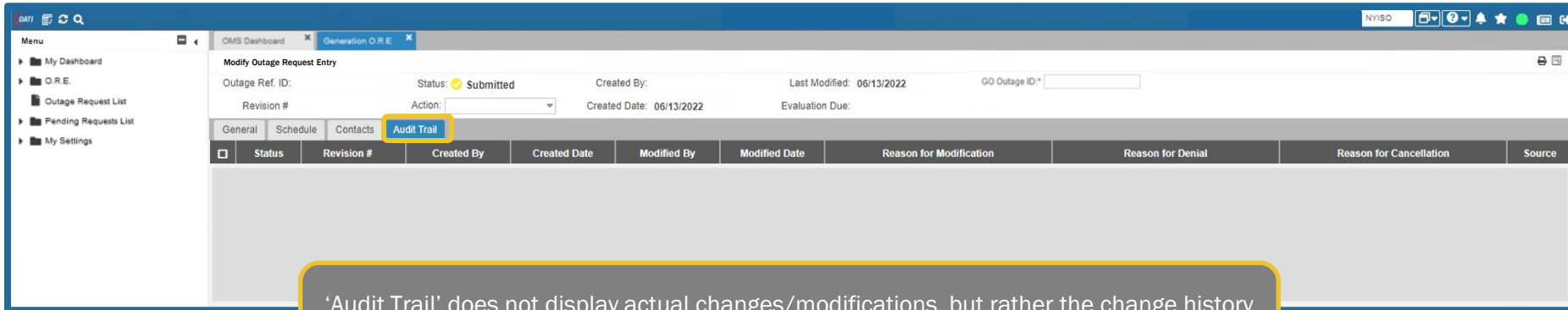
Submitting a Request

Click the dropdown arrow next to the 'Action' field to either Delete or Submit the outage request.



The screenshot shows the 'New Generation Outage Request Entry' form in the OMS Dashboard. The 'General' tab is active. The 'Action' dropdown menu is open, showing 'Delete' and 'Submit' options. A callout box points to the 'Delete' option, and another callout box shows a confirmation dialog: 'Deleting this outage request will permanently remove it from the database. Are you sure you want to delete 22-05812?' with 'Yes' and 'No' buttons.

Audit Trail

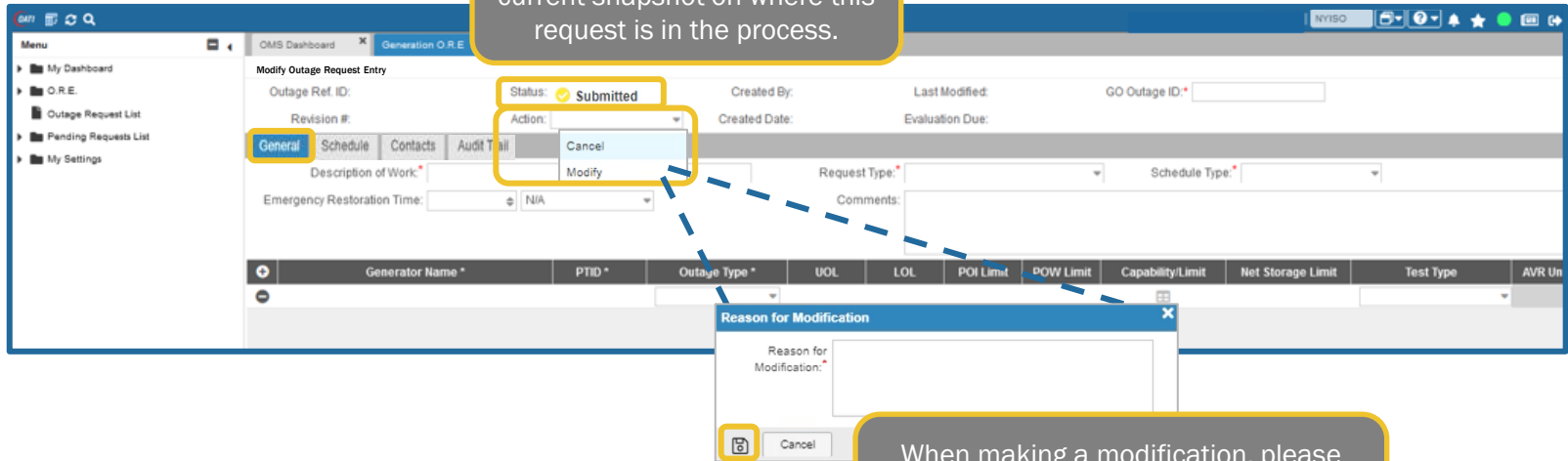


The screenshot shows the 'Modify Outage Request Entry' page in the NYISO OMS system. The 'Audit Trail' tab is selected and highlighted with a yellow box. Below the tab, a table header is visible with the following columns: Status, Revision #, Created By, Created Date, Modified By, Modified Date, Reason for Modification, Reason for Denial, Reason for Cancellation, and Source. The table body is currently empty.

'Audit Trail' does not display actual changes/modifications, but rather the change history across the various fields for this outage request

Cancelling and Modifying Request

The 'Status' field will provide a current snapshot on where this request is in the process.

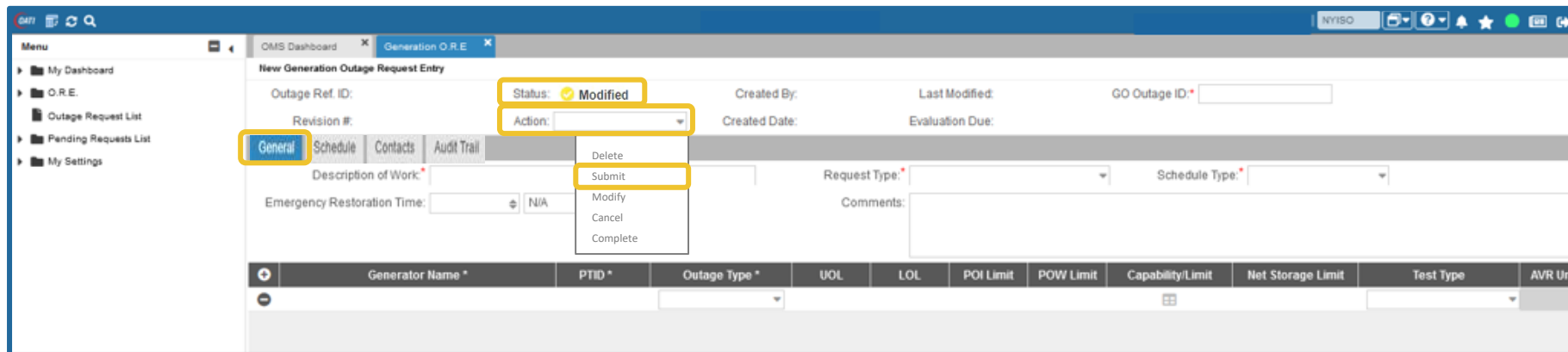


The screenshot shows the 'Modify Outage Request Entry' form in the OMS Dashboard. The 'Status' field is set to 'Submitted'. The 'Action' dropdown menu is open, showing 'Cancel' and 'Modify' options. A 'Reason for Modification' dialog box is open, showing a required field for the reason and a 'Save' icon.

To save modification reason, click the 'Save' icon.

When making a modification, please note that the 'Reason for Modification' is a required field.

Resubmitting a Request



The screenshot displays the 'New Generation Outage Request Entry' form in the NYISO OMS Dashboard. The 'Status' is 'Modified' and the 'Action' dropdown menu is open, showing options: Delete, Submit, Modify, Cancel, and Complete. The 'General' tab is selected in the left sidebar.

Form Fields:

- Outage Ref. ID: []
- Revision #: []
- Description of Work: []
- Emergency Restoration Time: [] N/A
- Created By: []
- Last Modified: []
- GO Outage ID: []
- Created Date: []
- Evaluation Due: []
- Request Type: []
- Schedule Type: []
- Comments: []

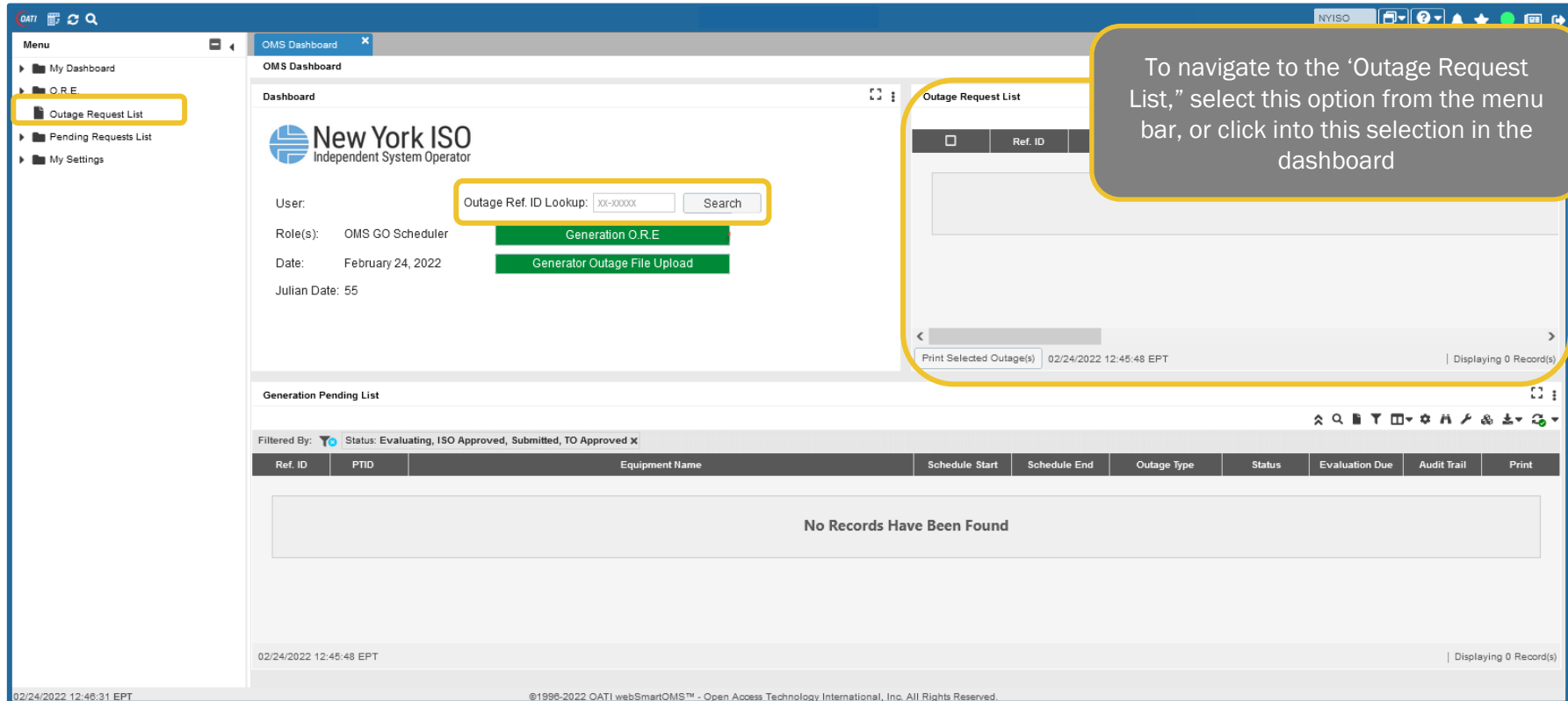
Table Headers:

Generator Name *	PTID *	Outage Type *	UOL	LOL	POI Limit	POW Limit	Capability/Limit	Net Storage Limit	Test Type	AVR Un
------------------	--------	---------------	-----	-----	-----------	-----------	------------------	-------------------	-----------	--------

Outage Request Status Conditions

Request State	Request State Defined
Created	Request information as entered has been saved and stored in the Outage Scheduler (OMS) database(s). The outage request has not been sent to the NYISO and TO evaluators.
Submitted	The request has been submitted to NYISO/TO for evaluation, but the evaluators (NYISO/TO) have not yet started the evaluation process.
Evaluating	The NYISO/TO evaluators have begun evaluating the outage request.
TO Approved	The TO evaluators have reviewed the outage request and agreed that the request can occur on the date/time specified for the outage request. In the case of a generation request, the TO is the local TO where the generator is located. In the case of a transmission request, the TO would be a switching authority.
NYISO Approved	The NYISO evaluators have reviewed the outage request and agreed that the request can occur on the date/time specified for the outage request.
Approved	Both the NYISO and the TO evaluators have reviewed the outage request and have agreed that the request can occur on the date/time specified for the outage request.
Denied	The NYISO/TO evaluators have reviewed the outage request and have determined that it cannot reliably occur. The evaluator will provide a reason for the denial and alternate dates when the outage can be accommodated.
Modified	A request that was previously evaluated, either approved or denied, is being edited. The user who is modifying the request is required to enter a reason for the modification.
Cancelled <i>(non-reversible)</i>	The submitter has decided to withdraw the outage request any time after the outage was submitted for evaluation. To have the request for cancellation recognized, the user who cancels the request is required to enter a reason for the cancellation. The outage request information remains in the Outage Scheduler (OMS) database(s) and can be displayed.
Completed <i>(non-reversible)</i>	This status is only available for generation outage requests. For a currently ongoing and approved request, the user can accurately reflect the early completion of the outage request. The user who is completing the request is required to enter the time and date of job completion.

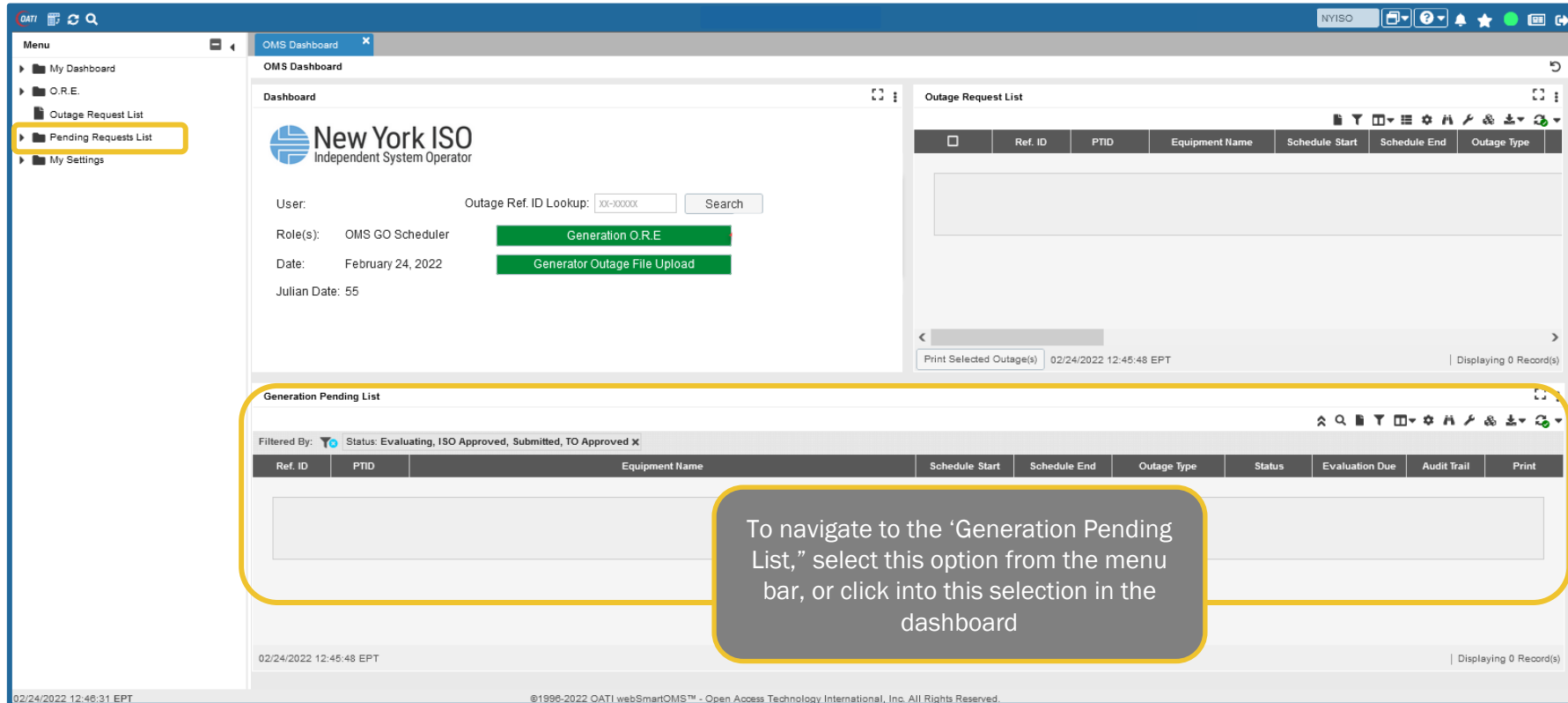
Outage Request List



The screenshot displays the OMS Dashboard for the New York ISO. The left-hand menu is expanded, and the 'Outage Request List' option is highlighted with a yellow box. The main content area shows the 'Outage Request List' page, which includes a search bar for 'Outage Ref. ID Lookup' with a 'Search' button, also highlighted with a yellow box. Below the search bar, there are two green buttons: 'Generation O.R.E.' and 'Generator Outage File Upload'. The page also displays a table with columns for Ref. ID, PTID, Equipment Name, Schedule Start, Schedule End, Outage Type, Status, Evaluation Due, Audit Trail, and Print. The table currently displays 'No Records Have Been Found'. A callout box on the right side of the dashboard provides instructions: 'To navigate to the 'Outage Request List,' select this option from the menu bar, or click into this selection in the dashboard'. The dashboard also shows the user's role as 'OMS GO Scheduler', the date as 'February 24, 2022', and the Julian Date as '55'. The footer of the dashboard includes the date '02/24/2022 12:46:31 EPT' and the copyright notice '©1996-2022 OATI webSmartOMS™ - Open Access Technology International, Inc. All Rights Reserved.'.

To navigate to the 'Outage Request List,' select this option from the menu bar, or click into this selection in the dashboard

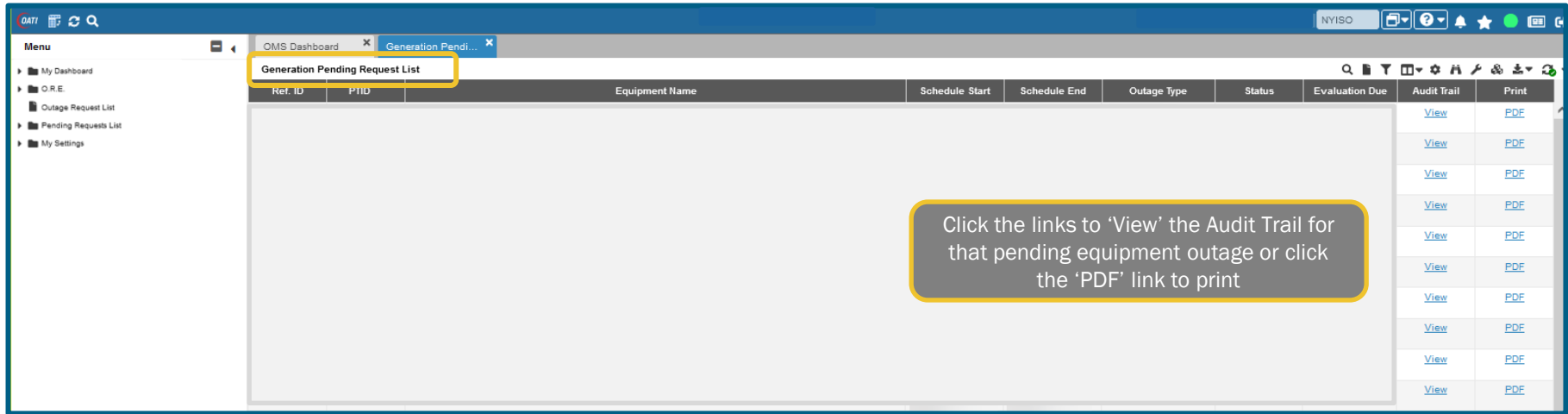
Generation Pending Request List



The screenshot displays the OMS Dashboard interface. On the left, a menu bar highlights the 'Pending Requests List' option. The main dashboard area shows the New York ISO logo and user information: User: [redacted], Role(s): OMS GO Scheduler, Date: February 24, 2022, and Julian Date: 55. There are two green buttons: 'Generation O.R.E.' and 'Generator Outage File Upload'. The 'Outage Request List' table is currently empty. Below it, the 'Generation Pending List' section is highlighted with a yellow border. It shows a filter for 'Status: Evaluating, ISO Approved, Submitted, TO Approved X' and a table with columns: Ref. ID, PTID, Equipment Name, Schedule Start, Schedule End, Outage Type, Status, Evaluation Due, Audit Trail, and Print. The table is also empty. A callout box with a yellow border points to the 'Pending Requests List' in the menu and the 'Generation Pending List' section, containing the text: 'To navigate to the 'Generation Pending List,' select this option from the menu bar, or click into this selection in the dashboard'.

To navigate to the 'Generation Pending List,' select this option from the menu bar, or click into this selection in the dashboard

Generation Pending Request List



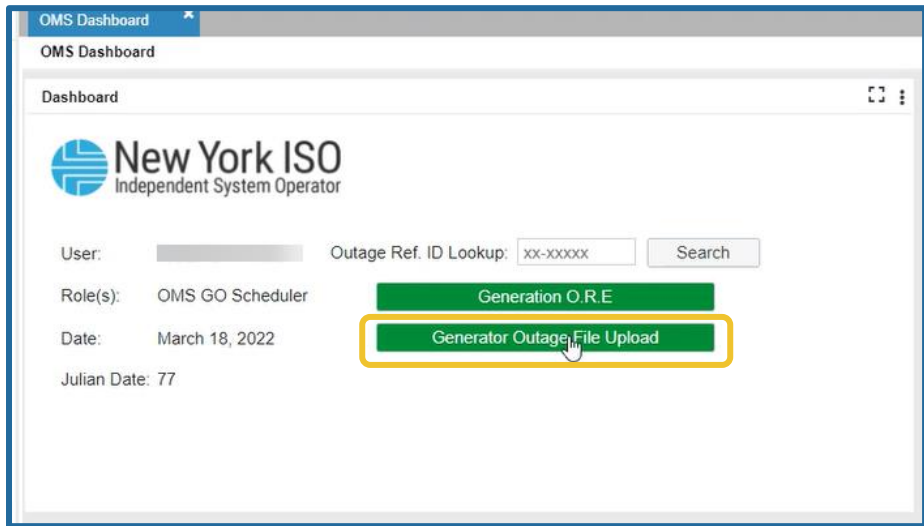
Generation Pending Request List

Ref. ID	PTID	Equipment Name	Schedule Start	Schedule End	Outage Type	Status	Evaluation Due	Audit Trail	Print
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF
								View	PDF

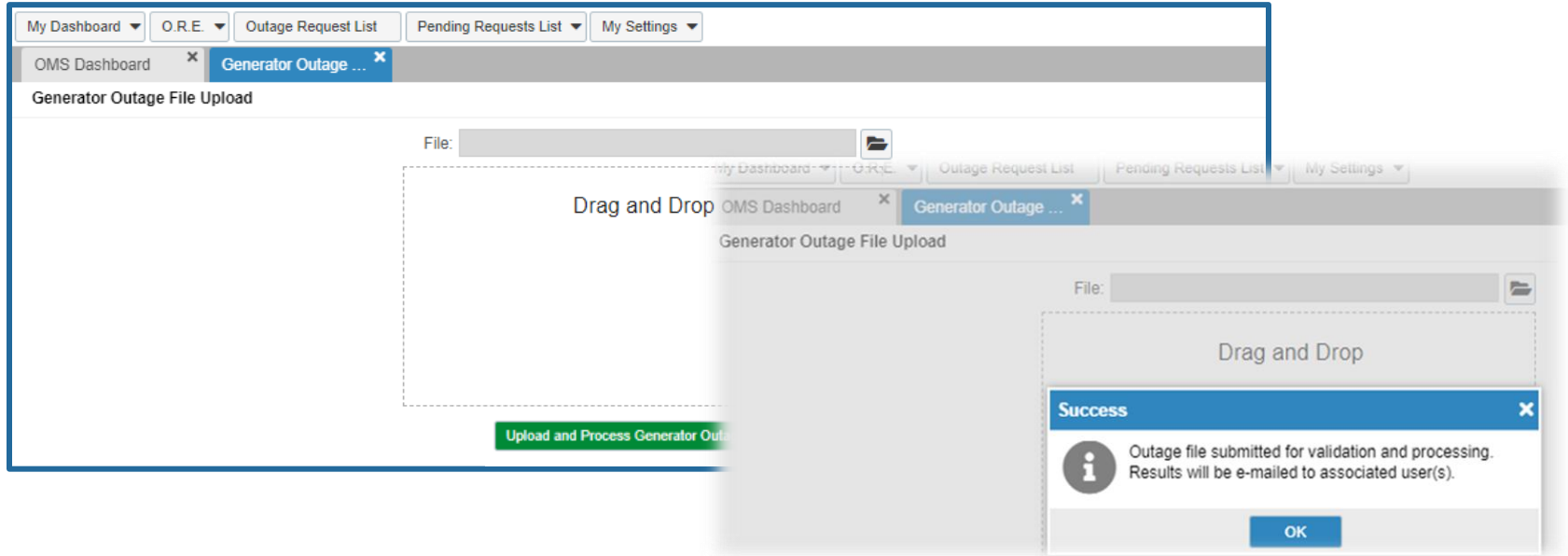
Click the links to 'View' the Audit Trail for that pending equipment outage or click the 'PDF' link to print

Uploading Generator Outage Requests

- **Generator Outage File Upload from OMS Dashboard**
 - CSV File Format
 - File may contain a single outage request, or multiple outage requests



Generator Outage File Upload



The screenshot displays the 'Generator Outage File Upload' interface. At the top, there is a navigation bar with 'My Dashboard', 'O.R.E.', 'Outage Request List', 'Pending Requests List', and 'My Settings'. Below this, the 'Generator Outage File Upload' page is shown. It features a 'File:' input field with a file icon, a dashed box labeled 'Drag and Drop', and a green button labeled 'Upload and Process Generator Outage'. A success message is displayed in a blue box with an information icon, stating: 'Success: Outage file submitted for validation and processing. Results will be e-mailed to associated user(s). OK'.

For more information on specific details required for .CSV uploads see OMS User Guide

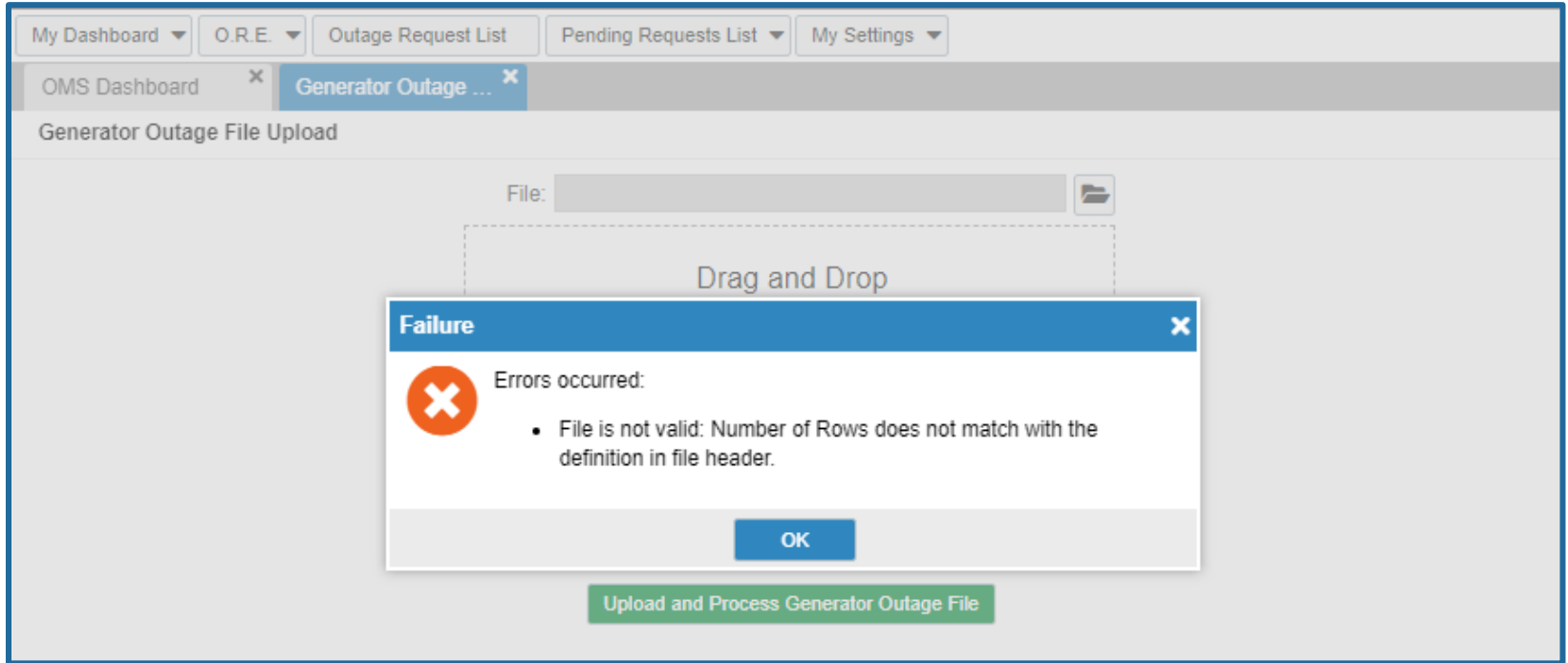
Generation Outage File Upload Validation

■ Levels of validation include

- Format validation
 - Initially checks for errors or missing information in the header records
- Syntax validation
 - Encompass validating that the correct component records are present for each individual outage request in the CSV file
- Business Rules validation
 - Each record within the entire outage request (General record and all Equipment records) must pass the validation rules for the outage request to be submitted



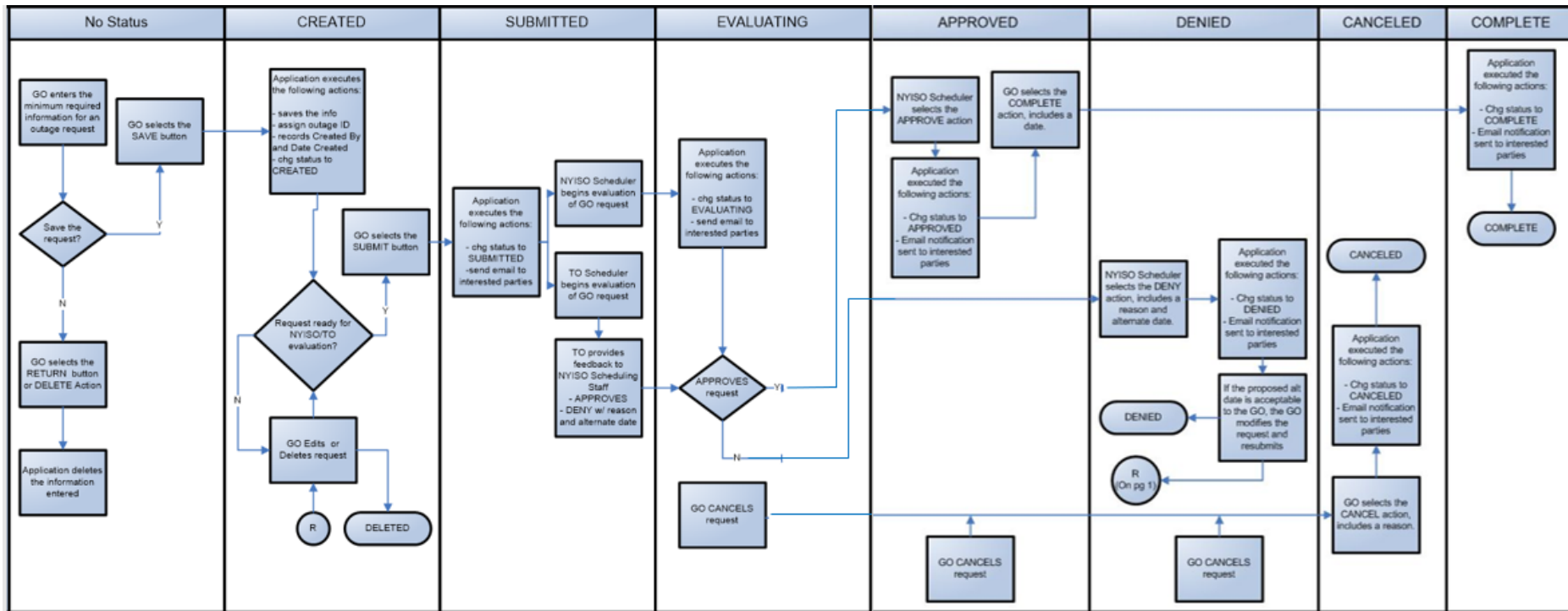
Generation Outage File Upload Validation



The screenshot shows the 'Generator Outage File Upload' interface. At the top, there are navigation tabs: 'My Dashboard', 'O.R.E.', 'Outage Request List', 'Pending Requests List', and 'My Settings'. Below these are two active tabs: 'OMS Dashboard' and 'Generator Outage ...'. The main content area is titled 'Generator Outage File Upload'. It features a 'File:' input field with a folder icon to its right. Below the input field is a dashed box containing the text 'Drag and Drop'. A modal dialog box titled 'Failure' is open in the foreground. The dialog has a blue header with a close button (X) and a white body with a red 'X' icon. The text inside the dialog reads: 'Errors occurred:' followed by a bulleted list: '• File is not valid: Number of Rows does not match with the definition in file header.' At the bottom of the dialog is an 'OK' button. Below the dialog, in the background interface, is a green button labeled 'Upload and Process Generator Outage File'.

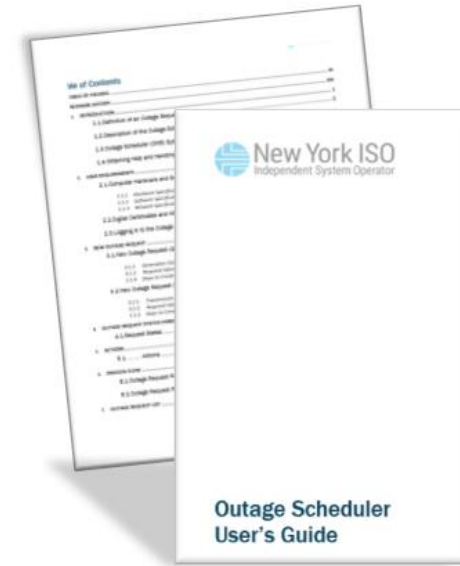
Additional Resources

Summary GO Outage Request Process Flow



NYISO Supporting Documentation

- Outage Scheduler User's Guide
- Market Participant User's Guide
- NAESB Digital Certificate Tutorial



Questions?

For any future assistance, please contact NYISO Stakeholder Services at stakeholder_services@nyiso.com or by phone at (518) 356-6060