Web Outage Management System (webOMS) Balancing Authority (BA) Approval Delegation Enhancement

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Customer Readiness

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## Definitions

<table>
<thead>
<tr>
<th>Abbreviation/Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>ACL</td>
<td>Access-Control List</td>
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<tr>
<td>API</td>
<td>Application Programming Interface</td>
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<td>BA</td>
<td>Balancing Authority</td>
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<td>BAA</td>
<td>Balancing Authority Area</td>
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<td>webOMS</td>
<td>Web Outage Management System</td>
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<tr>
<td>RC</td>
<td>Reliability Coordinator</td>
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<tr>
<td>SC</td>
<td>Scheduling Coordinator</td>
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<tr>
<td>TOP</td>
<td>Transmission Operator</td>
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Agenda

This learning burst provides information on the:

- Enhancement to enable “BA/TOP Confirm” flag in webOMS for SCs and ACL user participant type for Non CAISO_BA
WEBOMS ENHANCEMENTS
Balancing Authority Approval Delegation: webOMS BA/TOP Confirmed Flag

Previous functionality:

- Only BAs with Read/Write access were able to check the “BA/TOP Confirmed” flag in webOMS.
  - SCs and ACL user partners that were EIM Entities did not have access.

- All SCs and ACL participant type were classified as CAISO users.
  - Outage request had to go through the CAISO workflow requiring an approval from CAISO BA/Operations staff.

- The webOMS workflow was driven based on the participant that created the outage.

- If the participant was listed under the CAISO_BA, they would have to follow our guidelines for the outage approval.
  - Participants outside CAISO BA are classified as RC_CAISO or non_RC_CAISO depending on the RC.
Balancing Authority Approval Delegation: webOMS BA/TOP Confirmed Flag

New functionality:

• BA/TOP Confirmed flag opened to the EIM SCs and ACLs for resources outside CAISO BAA.
  – In addition to submitting outages, they can perform the “BA/TOP Confirmed” flag actions.
  – BA/TOP confirmation is a key component of moving the outages through to approval stage via the workflow.

• A BA can also “BA/TOP Confirmed” outages that were opened by SCs and ACLs within the BA.

• webOMS will be able to categorize the resources with the right outage origin and then determine the appropriate outage workflow.

• webOMS accounts for the use case where a participant has resources in both the CAISO BAA and EIM markets and drives the workflow based on the resource instead of the participant ID.
BA/TOP Confirmed Enabled for EIM Entities

“Confirmation Required” is only visible to the ISO and participants creating outages on resources outside the ISO BAA.
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>What is the purpose of the change for the BA/TOP Confirmed flag?</td>
<td>o EIM’s SCs and ACLs participant user types that are not CAISO_BA, now have the flexibility to confirm their BA/TOP outages.</td>
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<td>Do the BAs have access to the outages that are submitted by their SCs or ACL users?</td>
<td>o Yes. The BAs have access to the outages that are submitted by their SCs or ACL participant type. If their SC or ACL participant user type forgets to update the “BA/TOP Confirmed” flag, they can go into webOMS and update it on their behalf.</td>
</tr>
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<td>Who does it apply to?</td>
<td>o SCs or ACL participant user types that are non-CAISO_BA and have read-write webOMS access.</td>
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<td></td>
<td>o BAs that have read-write webOMS access.</td>
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<tr>
<td>Who does it not apply to?</td>
<td>o SCs and ACL participant user types who are identified as CAISO_BA. The ISO Operators would have to perform the approval function on their behalf.</td>
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</table>
Frequently Asked Questions

What happens if the EIM's SCs or ACL participant user type do not check the BA/TOP Confirmed flag?

- These outages will stay in the SUBMITTED state until either their “BA/TOP Confirmed” flag is checked or the RC desk follows up on these outages. The auto-transition rule for approved -> out also requires that the “BA/TOP Confirmed” flag to be set in webOMS.

What happens if the BA/TOP Confirmed flag is checked?

- The outage will be auto approved, most of the time. There is automatic transition to move outages from the submitted to the approved state only IF the “BA/TOP Confirmed” flag is set. “BA/TOP Confirmed” flag has to be checked for this outage to move from a SUBMITTED stage to an APPROVED state. Those with the “BA/TOP Confirmed” flag check will have their outages automatically moved from an APPROVED to an OUT state for the planned start time.
- All BA/TOP approved outages do not automatically move to the approved state due to other criteria needing RC review, but the bulk does.

Can you update the BA/TOP Confirmed flag via API?

- Yes. The webOMS User Interface (UI) can be used as a backup.
Reference Links

- webOMS Customer Partnership Group (CPG) presentation from 5/28/20

- WebOMS Technical Specification document

- webOMS page on the developer portal

- Technical User Group (TUG) meeting materials from developer portal
  [https://developerint.oa.caiso.com/Pages/Meetings/technical-user-group.aspx](https://developerint.oa.caiso.com/Pages/Meetings/technical-user-group.aspx)

- Outage Management Business Practice Manual (BPM)
Thank you for your participation!

For more detailed information on anything presented, please visit our website at: www.caiso.com

Or send an email to: CustomerReadiness@caiso.com