



California ISO

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

March 23, 2021

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Customer Readiness

Updated 3/23/21

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Definitions

Abbreviation/Term	Definition
ACL	Access-Control List
API	Application Programming Interface
BA	Balancing Authority
BAA	Balancing Authority Area
webOMS	Web Outage Management System
RC	Reliability Coordinator
SC	Scheduling Coordinator
TOP	Transmission Operator

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.

Balancing Authority Approval Delegation: webOMS BA/TOP Confirmed Flag

BA/TOP Confirmed Enabled for EIM Entities

Planned Start Date/Time	12/22/2020		23:00	
Planned End Date/Time	12/23/2020		00:00	
Actual Start Date/Time	<input type="text"/>			
Actual End Date/Time	<input type="text"/>			
Discovery Date/Time	12/02/2020		10:33	
BA/TOP Confirmed	<input type="checkbox"/> - Confirmation Required			
Emergency	<input type="checkbox"/>			

“Confirmation Required” is only visible to the ISO and participants creating outages on resources outside the ISO BAA

Frequently Asked Questions

What is the purpose of the change for the BA/TOP Confirmed flag?

- EIM's SCs and ACLs participant user types that are not CAISO_BA, now have the flexibility to confirm their BA/TOP outages.

Do the BAs have access to the outages that are submitted by their SCs or ACL users?

- 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.

Who does it **apply** to?

- SCs or ACL participant user types that are non-CAISO_BA and have read-write webOMS access.
- BAs that have read-write webOMS access.

Who does it **not apply** to?

- 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.

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
<https://developerint.oa.caiso.com/User%20Groups%20and%20Meetings%20Documents/OMS%20customer%20partnership%20group/Presentation-OutageManagementSystemCustomerPartnershipGroup-May28-2020.pdf>
- WebOMS Technical Specification document
<https://developerint.oa.caiso.com/Artifacts/OMS/TechSpecs/WebOMS%20Technical%20Specification.pdf>
- webOMS page on the developer portal <https://developerint.oa.caiso.com/pages/application.aspx?app=OMS>
- Technical User Group (TUG) meeting materials from developer portal
<https://developerint.oa.caiso.com/Pages/Meetings/technical-user-group.aspx>
- Outage Management Business Practice Manual (BPM)
[https://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Outage Management](https://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Outage%20Management)



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