

# **Oracle Utilities Network Management System**

User's Guide

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# Preface

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This guide describes how to use the Oracle Utilities Network Management System application. It provides instructions for completing common tasks and also provides descriptions of the fields, windows, buttons, and menus you will use to perform those tasks. Note that this guide describes the default product configuration for a user with complete authorization for all functionality. Different terminology may have been configured for your implementation, layouts may be changed, and some users or user types may not have access to certain functionality.

## Audience

This document is intended for users of the Oracle Utilities Network Management System application.

## Related Documents

For more information, see the following documents:

- *Oracle Utilities Network Management System Installation Guide*
- *Oracle Utilities Network Management System Quick Install Guide*
- *Oracle Utilities Network Management System Configuration Guide*
- *Oracle Utilities Network Management System Adapters Guide*

## Integration Guides

The following guides provide additional information for use when integrating with other Oracle Utilities applications.

- *Oracle Utilities Network Management System – Mobile Workforce Management Interface Implementation Guide*
- *Oracle Utilities Network Management System – Mobile Workforce Management Interface User Guide*

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## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Common Terminology

The following terms and acronyms are used in one or more adapter descriptions.

CIS	Customer Information System
DTD	Document type definition, used to define XML documents
Generic IVR Adapter	A Unix application that generally executes on the OMS server machine. It supports the Trouble Call, Event Status, Affected Customers, Callback Request and Callback Response Data Flows.
HA	High availability, where Oracle Utilities Network Management System is configured with a pair of redundant servers. This is usually in the form of a hardware cluster and a shared drive that contains the database.
ISIS	Clients access services and tools through a central concurrency management and messaging system called Isis. Isis is a real-time implementation of message oriented middleware and comprises the backbone of the system, providing access to the server for each client and the communication required between tools and services. Isis delivers the organized information to the client applications.
IVR	Interactive Voice Response system
JMSservice	Job Management Service. The Oracle Utilities Network Management System call processing and outage prediction engine.
MQSeries	A queue-based messaging system developed by IBM. This system has been renamed to WebSphere MQ.
NMS	Oracle Utilities Network Management System
ODService	Object Directory Service. ODService improves performance of the Oracle Utilities Network Management System system by caching large amounts of device information that is likely to be requested by applications. This caching allows the requests to be handled very quickly without directly accessing the database.
OMS	Outage Management System

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SCADA	Supervisory Control and Data Acquisition system
SMSERVICE	System Monitor Service. SMSERVICE monitors the core processes in the system, essentially the services and interfaces.
XML	Extensible Markup Language
XML Schema	An XML standard for defining XML documents
XSL	XML Style Sheet, used to reformat XML documents

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# Chapter 1

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## Web Workspace

This chapter describes the **Oracle Utilities Network Management System (NMS) Web Workspace** application. It includes the following topics:

- **Getting Started with Web Workspace**
- **Using the Work Agenda**
- **Using the Web Workspace Viewer**
- **Using the Web Workspace Control Tool**
- **Viewing Summaries**
- **Using the Alarms and Devices Lists**
- **Using the User Log**

### Getting Started with Web Workspace

The **Web Workspace** is a real-time application that provides the toolsets and views that are the foundation of the **NMS** user environment. The common features and platform provided by the **Web Workspace** provide a cohesive user experience for **NMS** application modules, such as **Outage Management** or **Web Switching Management**. This section provides information on common **Web Workspace** features, including the following topics:

- **Launching the Web Workspace and Logging In**
- **Understanding the Web Workspace Window**
  - **Common Features**
  - **Menus and Toolbars**
  - **Annunciators**
- **Window Positioning and Sizing**
  - **Moving Windows**
  - **Adjusting Window Size**
- **Working with Tables**
- **Sorting and Filtering Data**
- **Printing**
- **Taking Authority for Control Zones**
- **Creating an Event**

## Launching the Web Workspace and Logging In

### Launching the Web Workspace

Depending on your system installation, **Web Workspace** is typically accessed by an URL (provided by your **NMS** implementation team) or through shortcuts installed on your desktop or in your application menu (*e.g.*, the Microsoft Windows<sup>®</sup> Start menu or Linux Applications menu). Use the installed shortcuts, if applicable, or open the URL in a web browser to launch the application. The **NMS** will begin downloading *Java* components of the **Web Workspace** to your computer.

**Hint:** if you were given an URL, you may want to bookmark or create a shortcut for future use.

The **Web Workspace Login** window will open.

### Logging In

To login, enter the following information in the **Login** window:

1. **User ID:** enter the user name provided to you by your system administrator.
2. **Password:** enter the password provided to you by your system administrator.
3. **Validate:** click the **Validate** button to verify your login credentials.

**Notes:**

- If your user name and password are not entered correctly, the system will display a “Login Error” message.
- Once you have entered your user name and password, the **Validate** button will become activated; click **Validate** or press **Enter** while in the password field to validate your credentials.

4. **User Type:** select your User Type from the drop-down menu.

**Notes:**

- The User Type menu is populated based on the valid *User Types* for a given User ID.
- Users and User Types are maintained (added, edited, or deleted) in the **NMS** through the Configuration Assistant or product configuration files.
- Base product user types for the Web Workspace:
  - Administration
  - Crew Management (with Outage Management module only)
  - Full Operations
  - Trouble Maintenance (with Outage Management module only)
  - View Only

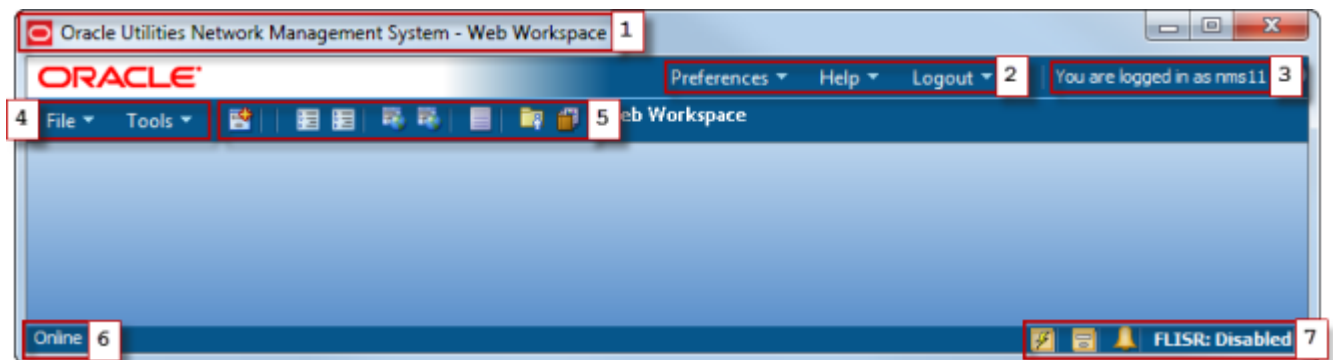
The order of user types is determined in the product configuration.

Once the login criteria have been set, click the **Login** button to complete the login process and open the Web Workspace. The Web Workspace *view* is based on the selected User Type.

The **Quit** button closes the **Login** window and exits the **NMS**.

## Understanding the Web Workspace Window

**Web Workspace** features and functionality are accessed through menus and toolbar buttons. A particular configuration of a user type's environment determines whether a tool is displayed as a window when you first log in to the system.



Web Workspace without any tools displayed.

Annotations:

1. Title Bar
2. Preference, Help, and Logout Menus
3. Login Information
4. File and Tools Menus
5. Toolbar
6. System Status Indicator
7. Annunciators

### Common Features

There are several features that are common to nearly all Web Workspace windows:

- **Title Bars** display the name of the tool or dialog.
- **Menus** provide access to tools and user actions. Menu options that are followed by an ellipsis [...] indicate that the option opens another window or dialog box.
  - **File** menu items typically start standard procedures (*e.g.*, printing or saving) and exit the window.
  - **Sort** and **Filter** menus allow you to modify how table data is sorted and filtered.
  - **Actions** menus provides access to features that are almost always specific to a particular window. Frequently used options on the Actions menu are often repeated as toolbar buttons.
  - **Help** menus provide access to information relevant to that window.
- **Toolbars** provide quick access to common functions. Toolbar buttons are used to perform an action or open a window. Button actions often correspond to Action menu options.
- **Annunciators** (or indicators) provide visual cues to system state or something that needs your attention.

## Menus and Toolbars

This section describes the menu and toolbar options available with the **Web Workspace**, the **Web Workspace with Switching Management**, and **Web Switching Request**. In the tables below, each menu item is listed along with submenu options, if available, and the default toolbar icon, if applicable; menu items without a default toolbar icon are indicated with a double dash (--) in the toolbar icon cell.

### Toolbars

- Web Workspace



- Web Workspace with Web Switching Management



- Web Switching Request





**Note:** Menu and toolbar options may vary depending on your system's configuration and which application modules have been implemented. Projects may also choose to assign toolbar icons to actions that are not in the product configuration.






### File Menu





Menu Option	Submenu Option	Description	Toolbar Icon
New	Switching Sheet... (Ctrl-N)	Opens the <b>New Switching Sheet</b> tool that allows you to create a new switching sheet based on switching event type (for example, planned or emergency).  This option is available in the <b>Web Workspace with Web Switching Management</b> and the <b>Web Switching Request</b> environments.	
	Safety Document...	Opens the <b>New Safety Document</b> tool that allows you to create a new safety document from a set of predefined types.  This option is available in the <b>Web Workspace with Web Switching Management</b> and the <b>Web Switching Request</b> environments.	
	Event...	Opens the <b>Create Event</b> tool that allows you to create a new outage or non-outage event.  This option is available in the <b>Web Workspace</b> and the <b>Web Workspace with Web Switching Management</b> environments.	



Menu Option	Submenu Option	Description	Toolbar Icon
Open	Switching Sheet... (Ctrl-O)	Allows you to open a switching sheet.  This option is available in the <b>Web Workspace with Web Switching Management</b> and the <b>Web Switching Request</b> environments.	
	Safety Document...	Allows you to open a safety document.  This option is only available in the <b>Web Workspace with Web Switching Management</b> environment.	

### Tools Menu

Menu Option	Submenu Option	Description	Toolbar Icon
Work Agenda 1...		Opens the Work Agenda.  See <b>Using the Work Agenda</b> on page 1-19.	
Work Agenda 2...		Opens a second Work Agenda.	
Viewer 1...		Opens the Viewer.  See <b>Using the Web Workspace Viewer</b> on page 1-27.	
Viewer 2...		Opens a second Viewer.	
Condition Summaries...		Opens the Condition Summaries. Predefined filters include: <ul style="list-style-type: none"> <li>All Conditions</li> <li>FLISR Actions<sup>a</sup></li> <li>FLISR Disabled<sup>a</sup></li> <li>Notes</li> <li>Pending Construction</li> <li>Pending Decommission</li> <li>Tags</li> </ul>	
SCADA Summary...		Displays the SCADA Summary.  See <b>Using the SCADA Summary Window</b> on page 1-83 for more information.	--
AMI Request List...		Open the AMI Request List.  See <b>Displaying the AMI Requests List</b> on page 2-20.	--

Menu Option	Submenu Option	Description	Toolbar Icon
Alarms and Devices List	Abnormal Devices List...	Displays a list of off-nominal devices in the subscribed authority zones.  See <b>Abnormal Devices List</b> on page 1-86.	--
	Device Operations List...	Displays all recent operations performed in the user's control zones.  See <b>Device Operations List</b> on page 1-87.	--
	SCADA Alarms List...	Displays a list of all SCADA alarms in the subscribed authority zones.  See <b>SCADA Alarms List</b> on page 1-88.	--
	System Alarms List...	Displays a list of system alarms.  See <b>System Alarms List</b> on page 1-87	--
Authority...		Opens the Authority tool, which grants control authority to users subscribing to discrete operations zones.  See <b>Taking Authority for Control Zones</b> on page 1-15.	--
Crews...		Opens the Crew Actions tool, which shows the crews available in the subscribed control zone.  See	--
Switching Overlaps...		Opens the Global Overlaps tool. This option is displayed only if you are running Web Workspace with Web Switching Management.	
Miscellaneous Log...		Opens the Miscellaneous Log. This option is displayed only if you are running Web Workspace with Web Switching Management.	
User Log...		Opens the User Log, which displays a list of all single-user actions within a certain time period. See <b>Using the User Log</b> on page 1-90.	
Manage Documents...		Opens the Manage Documents window, which allows you to associate documents to objects. See <b>Associating Documents to Devices</b> on page 1-76.	
Feeder Load Summary...		Opens the Feeder Load Summary, which displays a list of the current feeder loads. This option is only displayed if Feeder Load Management is configured for your system.	--

Menu Option	Submenu Option	Description	Toolbar Icon
FLISR Mode	Disabled Manual Automatic	Allows you to set the Fault Location, Isolation, and Service Restoration (FLISR) mode. This option is displayed only if FLISR is licensed for your system and you are running Web Workspace with Web Switching Management.	--
Topology Validation Viewer...		Opens the Topology Validation Viewer, which displays reports of a number of different common problem areas with a data model, such as deenergized supply points, loops, and faulted areas. See <b>Topology Validation Viewer</b> on page 15-1 for more information.	--

- a. Requires the **NMS FLISR** (Fault Location, Isolation, and Service Restoration) application.

### Preferences Menu

The **Preferences** menu allows you to control certain common features of the **Web Workspace**.

Menu Option	Description
<b>Save Preferences</b>	Saves the current settings as the user's preference. See <b>Saving Workspace Preferences</b> on page 1-10 for details.
<b>Restore Preferences</b>	Restores the environment preferences to the default settings.
<b>Audio Enabled</b>	Un-check to turn off audible alarms
<b>Alarm Popups</b>	Check to turn on popup alarms.



### Color Coding Options

The color coding options determine how table data and related views are color coded in tools that support color coding of data.

- **Disable Coloring:** disables table cell and row coloring.
- **Enable Cell Coloring:** enables table **cell** coloring.
- **Enable Row Coloring:** enables table **row and cell** coloring.

## Help Menu

Menu Option	Description
Web Workspace Help [F1]	Launches the online help system and loads the Web Workspace content.
Web Switching Help	Launches the online help system and loads the Web Switching content.  This option is available in the <b>Web Workspace with Web Switching Management</b> and the <b>Web Switching Request</b> environments.
About <application name>	Opens a window with environment and software information.
Calculate Network Latency...	Runs a network diagnostic utility and returns the results in the <b>Network connectivity results</b> window.

## Logout Menu

The **Logout** menu includes the Logout User function. Once selected, you will be unsubscribed from any subscribed control zones and all open windows will close. The Web Workspace Login window is redisplayed. Click **Quit** to exit the system.

## Annunciators

Annunciators are a combination of symbolic and text-based notifications of system statuses.



In the base environment, annunciator alerts are displayed for:

- **Unacknowledged Outage Events** (⚡). See **Acknowledging Events** on page 1-27 for details on responding to new events.
- **Unacknowledged Non-Outage Events** (📄). See **Acknowledging Events** on page 1-27 for details on responding to new events.
- **Unacknowledged System Alarms** (🔔). See **Using the Alarms and Devices Lists** on page 1-86 for details on viewing and acknowledging system alarms.
- **FLISR Mode Status**. *FLISR Mode* is displayed when FLISR is set to *Manual* or *Automatic* from the Web Workspace Tools > FLISR Mode menu. See **Fault Location, Isolation, and Service Restoration** on page 12-1 for more details on using FLISR.

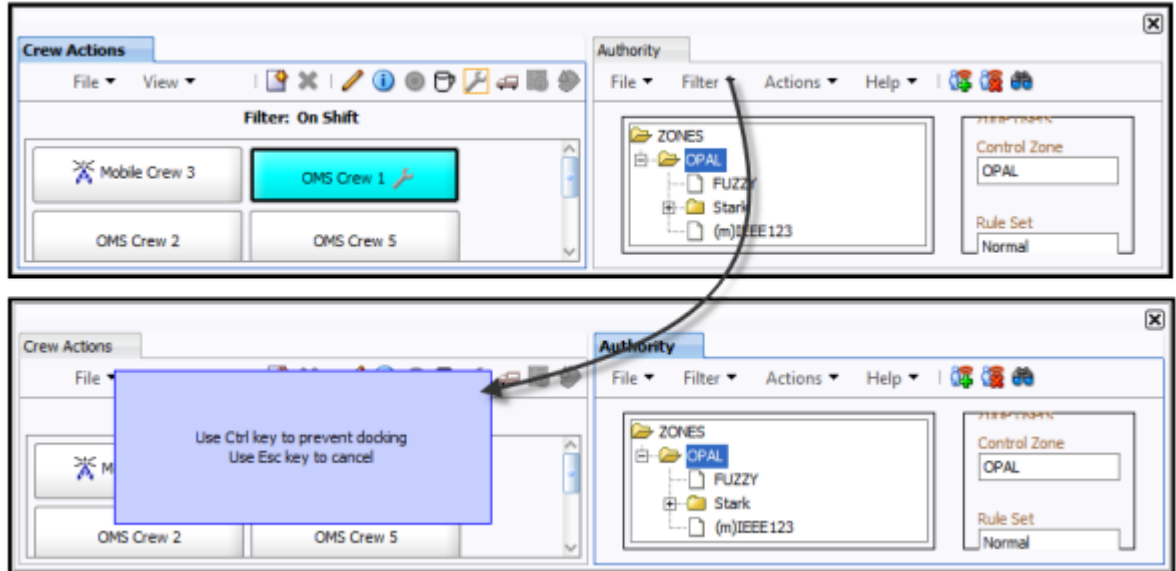
Additional annunciators may be added on a per implementation basis.

## Window Positioning and Sizing

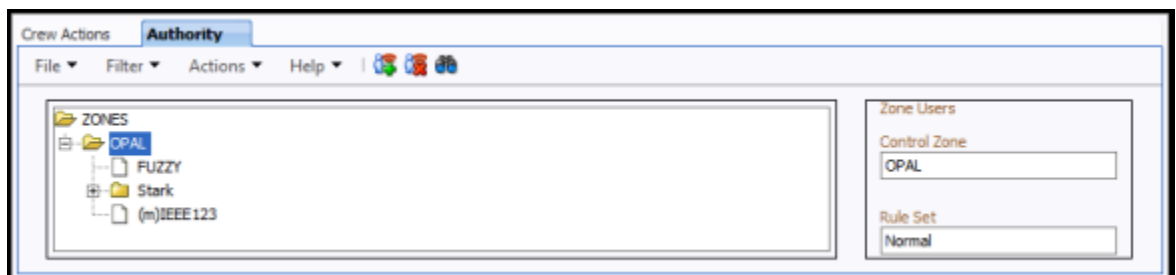
Web Workspace tool windows may be moved and sized in many ways within or outside of the Web Workspace primary window. The window positioning at startup is determined by the product or project configuration, but each user may move and size windows to support their workflow and preferences.

### Moving Windows

To move a window, click the window tab and drag the window to the desired location either within the Web Workspace or on the desktop. When moving windows with the Web Workspace, the window can be docked to a side (top, bottom, left, or right) or to a tab connected to another pane.



If you drop a window in the middle of an existing window, as shown above, it displays as a tab of the existing window:



If you do not want a window (or window group) to dock to other windows or positions in the Web Workspace, drag the window away from other windows until it does not snap to a location; alternatively, if you press the Control key as you release the mouse, the window will not dock.

### Adjusting Window Size

Resizing windows in NMS is equivalent to resizing an application window in Microsoft Windows or Linux. You may resize by clicking and holding a window edge and dragging until the window is the desired size; minimize by clicking the minimize button in the upper right corner of the window; maximize either by double-clicking the top of the window frame or by right-clicking and selecting **Maximize**. Depending on the windows state, right-click options will allow you to

minimize, float, move, or dock the window. The Size right-click option displays the windows dimensions, in pixels.

## Saving Workspace Preferences

Web Workspace starts with a standard configuration for window locations and sizes, visible tools, and tool settings, such as column size and order. You can make adjustment to the workspace and then save those changes for future sessions.

To save your preferences, select **Save Preferences** from the Web Workspace **Preferences** menu. Preferences are saved locally on the client PC; therefore, your saved preferences will not be available if you login from another computer. Settings are saved for Viewer 1 and Work Agenda 1, but not for Viewer 2 or Work Agenda 2.

The following settings are saved:

- The set of currently open windows are saved and used as the set of windows to display on login.
- Window sizes are saved for non-docked windows.
- Window placement is saved for non-docked windows; does not apply to dialog boxes.
- Table column widths are saved.
- Table column ordering is saved.

**Note:** to save user preferences for switching tools, each switching plan type (*e.g.*, emergency, planned, etc.) needs to be saved separately. Ensure that only one switch plan of each type is displayed when you save your preferences.

## Restoring Default Preferences

To restore the default environment settings, select **Restore Preferences** from the Web Workspace **Preferences** menu.

## Working with Tables

### Selecting and Unselecting Rows

Many tables in **Oracle Utilities Network Management System** applications and tools allow multiple rows to be selected for a subsequent action, such as acknowledging new events in the Work Agenda or new system alarms in the Alarms and Devices Lists.

#### Selecting a Single Row

To select a row, click anywhere in the row; the row will change to the selected highlight color.

#### Selecting Contiguous Rows

To select contiguous rows, click the first row and then Shift-click the last row to select the anchors and all rows in between.

#### Selecting Discontiguous Rows

To select discontiguous rows, select the first row and then Ctrl-click each additional row.

#### Unselecting Rows

To unselect a row, Ctrl-click any cell in the row. The highlight color will be removed. Note that the cell may have a highlighted border, but it is not in a selected state.

## Copying Table Data

Many tables in **Oracle Utilities Network Management System** applications and tools allow data to be copied and pasted into other applications.

1. Select the row or rows to be copied.
2. Press Ctrl-C to copy the row data.
3. In the target application, such as a spreadsheet application, press Ctrl-V to paste the data.

## Sorting and Filtering Data

You can sort many Web Workspace data tables to display rows in a particular order or filter them to display a specific subset of the rows. Some of the Web Workspace tools also allow you to create your own user-defined sorts and filters. These options, if available, will be found in the tool's Sort and Filter menus or from an options menu when you right-click on the column heading .

### Sorting

You can apply ascending or descending sorts to a single column in a table (where configured) by clicking once on the column header; clicking a second time on the column header will sort the rows in the opposite order. An arrow appears next to the column label identifying if the sort is ascending or descending.

Sort topics include:

- **Using the Sort Dialog Box**
- **Creating a User-Defined Sort**
- **Editing and Deleting Saved Sorts**

### Using the Sort Dialog Box

Some Web Workspace tools allow you to create, modify, apply, and save user-defined sorts. Sorts are saved for each application, user, and user type. Thus, if a user logs in with multiple user types, each type will have their own set of sorts.

If a table supports user-defined sorts, select **Sort Dialog...** from the Sort menu or click the **Sort** button on the toolbar to display the Sort Dialog. You can also right-click the table header and then select **Sort...** from the pop-up menu.

The Sort Dialog displays the following items:

- The **Current Sort** drop-down menu presents a list of saved sorts for modification. When you select a sort from the list, the sort criteria are displayed.
- The table within the dialog allows you to specify the order in which the sort criteria is applied, which column in the application is to be used in the sort criteria, and in which direction the sort is to be applied (ascending, descending).
- The **OK** button applies the current sort to the table of data and exits the Sort dialog.
- The **Save...** button opens a dialog box for naming and saving the current sort. Saving automatically applies the sort. You can retrieve sorts through the option menu on the Sort dialog and the Sort menu in the window.
- The **Delete** button opens a dialog box asking you to confirm the deletion of the selected sort. Once it is deleted, you can no longer retrieve the sort.
- The **Show** button applies the current sort settings to the table of data, but does not exit the Sort dialog.
- The **Help...** button display help for using the Sort dialog.
- The **Exit** button exits the Sort dialog.

- The **Current Sort** drop-down presents a list of saved sorts for modification.

### Creating a User-Defined Sort



To create a user-defined sort, complete these steps:

1. Open the Sort Dialog by selecting **Sort Dialog...** from the Sort menu or by right-clicking the table header and selecting **Sort...** from the pop-up menu.
2. In the row for Order 1, click on the drop-down menu under **Column** and select the first column you wish to sort by, and then click on the drop-down menu under **Direction** and select which order you wish to sort the column by.
3. Repeat the previous step for any other columns you additionally want to sort by.
4. Click the **Save...** button. The Store the Sort? dialog appears, prompting you to name the sort.
5. Click the **Yes** button. The Store the Sort? dialog appears, and the name you provided now appears in the option menu of saved sorts.
6. Click the **OK** button. The Sort dialog closes, and the sort is saved to the database.

### Editing and Deleting Saved Sorts

You can use the option menu in the Sort Dialog to select a saved sort for modification. You can also delete a saved sort by selecting it from this menu and clicking on the **Delete** button.

### Quick Sorting

You can sort the contents of a list by clicking on a column header. An icon indicates that the column is being sorted; ascending (  ) or descending (  ) order.

### Filtering

In addition to sorting, certain windows allow you to filter the data displayed. Filtering topics include:

- **Using the Filter Dialog**
- **Creating a User-Defined Filter**
- **Editing and Deleting Saved Filters**
- **Dynamic Filtering**
- **Auto Filtering**

### Using the Filter Dialog

The Filter dialog is used to create, modify, apply, and save user-defined filters. User-defined filters are only accessible to the user who creates them and are erased when the user logs out unless they have been saved; to save, select **Save Preferences** from the **Web Workspace Preferences** menu.

To display this dialog, select **Filter Dialog...** from the Filter menu. You can also right-click on the table header, and select **Filter...** from the pop-up menu.

The Filter dialog displays the following items:

- The **Current Filter** drop-down menu presents a list of saved filters for modification. When you select a filter from the list, the filter criteria are displayed.
- **Filter Criteria**
  - **Column Name** displays the name of each column available in the table of data you are filtering.



- The **Operator** column displays the type of filter, as described in the following table:

Option	Description
any	No filter is applied to this field.
match	Table rows display only if the field value exactly matches the filter value.
like	Table rows display only if the field value includes the filter value (e.g., “Status” includes “tat”).
not like	Table rows display only if the field value does not include the filter value (e.g., “Status” does not include “tot”).
multi-match	Matches with multiple arguments. Multiple filter values may be entered in the same field, separated by spaces.
not	Table rows display only if the field value does not match the filter value.
multi-not	Not with multiple arguments. Multiple filter values may be entered in the same field, separated by spaces.
>=	Greater than or equal to. Table rows display only if the field value is greater than or equal to the filter value.
<=	Less than or equal to. Table rows display only if the field value is less than or equal to the filter value.

- The **Match Value** field is the value you want to filter by. For example, to show only data for the current day, you would set the Type to Match and the Value to the current date.
- Actions**
  - Save...** opens a dialog box for naming and saving the current filter. Saving automatically applies the filter. You can subsequently retrieve saved filters through the Current Filter option menu and the Filter menu in the window.
  - Delete** opens a dialog box asking you to confirm the deletion of the selected filter. Once it is deleted, you can no longer retrieve the filter.
  - Apply** applies the current filter settings to the table of data, but does not exit the Filter dialog box.
  - Help...** displays help for the Filter dialog.
  - Exit** closes the Filter dialog box and removes any applied filter settings.

### Creating a User-Defined Filter

To create a user-defined filter, complete these steps:

- Open the Filter Dialog by selecting **Show Filter Dialog** from the Filter menu or by right-clicking the table header and selecting **Filter...** from the pop-up menu.
- Click on the **Operator** drop-down menu of a column you want to filter by and select the option you want.
- In the **Match Value** column next to the selected **Operator**, enter the desired filter value.
- Repeat the two previous steps for any other columns you want to filter by.

- Click **Save**. A dialog box appears, prompting you to name the filter.
- Type a name into the field and click **Yes**. The table is filtered according to the selected criteria, and the Filter field above the table now displays the name of your newly created filter.

**Note:** You can view the filter by clicking on the **Apply** button, but if you click Exit, the applied filter will be undone before the dialog box closes.

### Editing and Deleting Saved Filters

You can use the Current Filter drop-down menu in the Filter Dialog window to select a saved filter for modification. You can also delete a saved filter by selecting it from this menu and clicking on the **Delete** button.

### Dynamic Filtering








Some tables provide a row of blank filter boxes above the column headers. Enter all or part of the text you want to filter by in the appropriate filter box. The table data is dynamically filtered to display items that contain matching values as you enter the filter criteria. You can combine filter criteria by typing values in more than one column. In the example below, only device IDs containing an “S” remain after adding an **S** to the filter box.




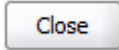
### Auto Filtering

Some tables support auto filtering (also referred to as cell filtering), which allows you to filter the list by the value of any cell. To use auto filtering, right-click a cell containing the value you want to filter, and select the **Toggle Auto Filter** option. (When enabled, the menu option is checked.) The table is refreshed to display only rows where the value matches the selected cell. For example, if you click on a cell in the Feeder column with a value of “2413” and enable auto filter, the table will refresh to display only events for Feeder 2413. Click the option again to turn off cell filtering.

## Printing

Printing is an option from several of the Web Workspace and Web Trouble windows. The Print Preview dialog box appears whenever one of the printing options is selected in Web Workspace or Web Trouble. The following table describes the buttons on the Print Preview dialog box.

Button	Description
	Used to preview the previous page in a multi-page output.
	Used to preview the next page in a multi-page output.
	Used to zoom out on the contents of the preview.
	Used to zoom in on the contents of the preview.
	Used to scale out the font used for the print output.
	Used to scale in the font used for the print output.
	Toggles the page orientation of the output between portrait and landscape.

Button	Description
	Brings up the Page Setup dialog box, which allows you to select paper size and source, set page orientation, set margins, and select the printer.
	Reverts the preview window back to its default settings.
	Sends the print output to your selected printer, and then closes the Print Preview dialog box.
	Closes the Print Preview dialog box without printing any output.

### Setting Print Margins

The Print Preview dialog box also allows you to set the margins of the output interactively. Follow these steps:

1. Position your cursor over the preview output until you see a red outline and your cursor becomes a double-headed arrow.
2. While the cursor is a double-headed arrow, click and hold your left mouse button and drag the red line to the desired location.

## Taking Authority for Control Zones

The Authority tool is used to manage permissions to view data and perform operations in the operations network. Permissions are granted to operate in *Control Zones*, which are discrete sections of a utility's electrical distribution system. *Control Groups* are groups of control zones. You must subscribe to a control zone or a zone group to see events, manage crews, or perform device operations in that section. Once subscribed, you can examine and change the assignment of control zones, view control areas within the distribution system, and identify which users have authority over each section. This section provides information on using the **Authority tool**, including the following topics:

- **Using the Authority Tool**
- **Subscribing to a Control Zone**
- **Subscribing to an Authority Group**
- **Unsubscribing from a Control Zone**
- **Searching for a Zone**

### Using the Authority Tool

If the Authority tool is not visible in the Web Workspace, select Authority... from the Web Workspace Tools menu.

#### Authority Tool Fields

The Authority tool has the following fields:

- The **Zones** area displays control zones or control groups.
- **Zone Users** displays the user(s) currently subscribed to the selected control zone. If no user is subscribed to the selected control zone, “system” displays in this field.

- **Control Zone** displays the currently selected control zone.
- **Rule Set** displays the rule set currently being used.

**Note:** Rule Sets are operating conditions, such as *Normal* or **Storm**, that are typically set by Administrators or Shift Supervisors.

## Authority Tool Menus




### File Menu

Menu Option	Submenu Option	Description	Toolbar Icon
Exit		Closes the Authority tool window.	--

### Filter Menu

Menu Option	Submenu Option	Description	Toolbar Icon
All Zones		Shows all Control Zones in the tree structure.	--
My Zones		Shows all Control Zones controlled by you.	--
Users' Zones		Shows Control Zones that are controlled by users/operators.	--
System Zones		Shows control zones that are controlled by the System.	--
Zone Groups		Shows the Zone Group table, which allows you to subscribe to or view zone groups.	--



### Actions Menu

Menu Option	Submenu Option	Description	Toolbar Icon
Subscribe...		Opens the Subscribe window that allows you to select subscribe to Control Zone(s) or Control Group(s).	
Unsubscribe...		Allows you to unsubscribe from subscribed control zones.	
Zone Search		Allows you to search for a control zone in the control hierarchy.	
Change Rule Set...		Allows you to change the operations rule set.	--


## Help Menu

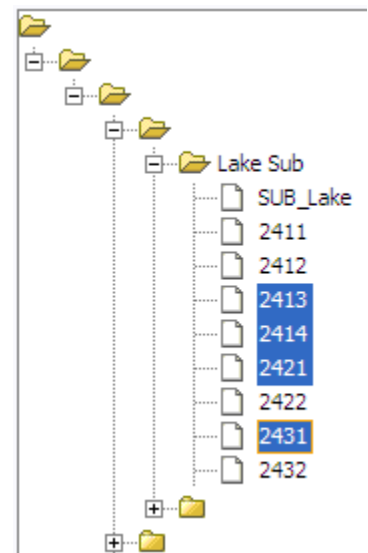
Menu Option	Submenu Option	Description	Toolbar Icon
Authority Help		Opens the online help system to the Authority tool help content.	--

## Subscribing to a Control Zone

With the Authority tool filter set to All Zones, the Authority tool lists all control zones in a hierarchical tree view. You may subscribe to an individual control zone, which is represented by a page icon (  ), or a zone collection, which is represented by a folder icon(  ) for an unexpanded collection.


To subscribe to one or more control zones, complete these steps:

1. Expand the list of Control Zones (click the “+” signs) to locate the zone you want to control.
2. Select the row for the zone or zone folder . The zone will populate the Control Zone field.
  - To select multiple adjacent zones, hold down SHIFT and click the first and last zones to select all of the zones in that range; to select multiple non-adjacent zones, hold down CTRL and click each zone individually.
3. Click the **Subscribe** button (  ) or select **Subscribe...** from the Actions menu. The Subscribe dialog box opens.
4. Click **Subscribe** in the dialog box. You are now subscribed to the selected zone(s).



## Subscribing to an Authority Group

To subscribe to a Authority Group, first select Zone Groups from the Authority tool's Filter menu to view the Authority Group table and then complete these step:


1. Select one or more rows from the Authority Group table. If the list of Authority Groups is long, you may use the filter box above the Authority Group title to find the desired group.
2. Click the **Subscribe** button (  ) or select **Subscribe...** from the Actions menu. The Subscribe dialog box opens.
3. If applicable, uncheck any control zones in the Authority Group that you do not wish to subscribe to.
4. Click **Subscribe**. You are now subscribed to the selected zone(s).

## Unsubscribing from a Control Zone

When you are finished working in a control zone, you can unsubscribe from the control zone.


**Note:** remember that you are automatically unsubscribed to all of your control zones when you logout.

To unsubscribe, complete these steps:

1. Select **My Zones** from the Filter menu.
2. Select the row containing the zone that you want to unsubscribe from. The zone will populate the Control Zone field.
3. Click the **Unsubscribe** button (  ) in the toolbar or select **Unsubscribe...** from the Actions menu. The Unsubscribe dialog box opens.
4. Click **Unsubscribe** in the dialog box. You are now unsubscribed from the zone.

## Searching for a Zone

The Search feature can help you locate a control zone more quickly than expanding and viewing zones in the Authority window. To search for a zone, complete these steps:

1. In the Authority window, click the **Zone Search** button (  ) in the toolbar or select **Zone Search...** from the Actions menu. The Search Tool dialog box opens.
2. Enter the name or first part of the name of the control zone in the Zone field and then click the **Find Next** button. The search is not case-sensitive, but you must match exactly in your typing of spaces, hyphens, etc. If the system finds a match, the list of control zones expands and that zone is highlighted.
3. If there are multiple matches, click **Find Next** to locate the next control zone that matches your search criteria.
4. When you locate the zone you want, click the **Cancel** button to close the Search Tool dialog box.

## Creating an Event

Sometimes a crew out in the field may discover and report an issue that hasn't been identified by a customer. As an operator, you may wish to get these events recorded in Oracle Utilities Network Management System. One way to do so is to use the **Create Event** tool.

To open the **Create Event** tool, select **File>New> Event...** from the Web Workspace menu. The Create Event tool displays the following fields and buttons:

- The Selected Device field displays the name of the device on which to create the event.
- The Event Start field and calendar button allow you to enter the start date for the event.
- The Outage/Non-Outage buttons allow you to designate whether the event should be created as an outage or non-outage.
- The **OK** button creates the new event on the selected device and closes the Create Event window.
- The **Help** button displays help for the current window.
- The **Cancel** button closes the Create Event window without creating a new event.

## Using the Work Agenda

The Work Agenda displays event (or work) data. These events vary based on the modules and interfaces that have been implemented, but may include switching actions (with Switching Management), outage events (with Outage Management), etc. Events may be in various states, such as *New*, *In Progress*, *Incomplete*, or *Complete*.

This section includes the following topics:

- **Opening Multiple Work Agenda Windows**
- **Work Agenda Views**
- **Work Agenda Menu and Toolbar Features**
- **Work Agenda Data Fields**

### Opening Multiple Work Agenda Windows

You can open more than one Work Agenda. To open a new Work Agenda, select the **Work Agenda 1** or **Work Agenda 2** option from the Web Workspace Tools menu. The new Work Agenda displays as a tab next on the Web Workspace window, to the right of any existing Work Agenda tabs.

When you select a row in one Work Agenda window, the system automatically selects the row for that event in all other Work Agendas (if the row is not being filtered).

All Work Agendas are subscribed at the same level as the original Work Agenda and other tools, but can have their own dynamic sorts and filters applied. The selected events are shared across the Work Agendas.

### Work Agenda Views

Work Agenda *views* are filters based on event type and/or status. These filtered views are referred to as *lists* and the list name is displayed on the Work Agenda tab. For example, in the standard **NMS** product offering, the Web Workspace starts with Work Agenda open in the **To Do** list view, which displays all new and unassigned events that require attention, and the tab is labeled “Work Agenda: To Do.”

**Note:** the Work Agenda does not display any events until you take authority of a control zone (see **Taking Authority for Control Zones** on page 1-15).


Each row of the Work Agenda contains information about an event. A summary row at the top of the Work Agenda displays summary counts for all of the events listed in the current view.

The Work Agenda is configured with several different views that can be selected through the Filter menu or toolbar icons.

## Work Agenda Menu and Toolbar Features

This section lists and describes the menu options and toolbar icons available in the Work Agenda.




**File Menu** - The table below describes the options available on the File menu.

Menu Option	Description	Toolbar Icon
Print	Displays the Print Preview dialog so you can view or print the list.	
Exit	Closes the Work Agenda window.	--



**Sort Menu** - The table below describes the options available on the Sort menu.

Menu Option	Description	Toolbar Icon
Sort Dialog...	Opens the Sort dialog, allowing you to create, modify, apply, and save user-defined sorts. See <b>Using the Sort Dialog Box</b> on page 1-11.	--
Default	Applies the default sort.	--






**Filter Menu** - The table below describes the options available on the Filter menu.


Menu Option	Description	Toolbar Icon
Outages	Displays all outage events.	--
Non Outages	Displays all non-outage events.	--
Both	Displays both outage and non-outage events.	--
Filter Dialog...	Opens the Filter dialog where you can create, modify, apply, and save user-defined filters. See <b>Using the Filter Dialog</b> on page 1-12.	--
All	Displays all events of any status.	
Completed	Displays all completed and cancelled trouble events (events with Status CMP, F-CMP, S-CMP, P-CMP, M-CMP, W-CMP, CNL, F-CNL, and W-CNL).	
Default	Applies the filter for the currently selected view ( <i>e.g.</i> , To Do displays only events with Status NEW, S-NEW, P-NEW, M-NEW, UAS, S-UAS, P-UAS, M-UAS, W-UAS, RED, CRT, NFY, and C-CNL).	--
In Progress	Displays most trouble events that have crew resources associated with them ( <i>e.g.</i> , a crew is onsite and is working to resolve the problem), as well as any trouble event alarms (events with Status ASN, F-ASN, ENR, F-ENR, S-ENR, W-ENR, S-ASN, W-ASN, ONS, F-ONS, S-ONS, W-ONS, SUS, S-SUS, W-SUS, RST, S-RST, RSCH, NFY, and VFY).	




Menu Option	Description	Toobar Icon
Incomplete	Displays all incomplete trouble events and events that have maintenance work pending (events with Status INC, S-INC, P-INC, M-INC, MNP, and S-MNP). Incomplete events are events that are complete in the field but the information for them has not been completely entered on the Event Details window.	
Switching	Displays all events that have an associated planned switching sheet in a Scheduled (or later) status.	--
To Do	Displays trouble events that require attention, as well as any trouble event alarms (events with Status NEW, F-NEW, S-NEW, P-NEW, M-NEW, UAS, F-UAS, S-UAS, P-UAS, M-UAS, W-UAS, SNT, S-SNT, P-SNT, M-SNT, W-SNT, RED, CRT, RSCH, NFY, VFY, and C-CNL).	

**Actions Menu** - The table below describes the options available on the Actions menu. It also indicates whether the option displays in a pop-up menu when you right-click a row in the Work Agenda.

Menu Option	Description	Toolbar Icon	Right-Click Y/N
Acknowledge	Acknowledges the selected event.		Y
View...	Opens Viewer 1 if not already open, and then focuses Viewer 1 on the device from the selected Work Agenda row.		Y
Trouble Info...	Opens the Trouble Info window with information about the selected event.		Y
Event Details...	Opens the Event Details window with information about the selected event.		Y
Referral...	Opens the Work Queue dialog, allowing you to select a work group to refer the event to and enter any necessary remarks.		Y

Menu Option	Description	Toolbar Icon	Right-Click Y/N
Release Crew(s)...	<p>Opens the <b>Release Crew(s)</b> dialog box, which lists crews assigned to the selected event. One or more crews may be selected:</p> <ul style="list-style-type: none"> <li>Click on a crew name to select one crew.</li> <li>Click, hold, and drag to select multiple adjacent crews.</li> <li>Control-click to select multiple non-adjacent crews.</li> </ul> <p>Once the crew(s) have been selected, click <b>Release</b> to release the crews from the event.</p> <p>The Release Crew(s) dialog box will close, the crew will no longer be associated with the event, and the crew symbology will disappear from the Viewer.</p>	--	Y
Incomplete	Changes the status of the event to an Incomplete status that is appropriate for the selected event ( <i>e.g.</i> , INC, S-INC, P-INC, M-INC).	--	N
Cancel Event...	Cancels the selected event. A dialog box opens prompting you for a reason for the cancellation.		Y
Group Events...	Opens the Group Events dialog box, which allows you to manually group, relate, and unrelate events.	--	N
Associate Event...	Allows you to associate the selected fuzzy event to a device.	--	N
Send to Mobile	Changes the event status to a Sent status that is appropriate for the selected event ( <i>e.g.</i> , SNT, S-SNT, P-SNT, M-SNT, W-SNT). Also, if the Sent to Mobile column value happens to be “N” at the time the <b>Send to Mobile</b> button is pressed, it will update to a value of “Y”.	--	N
Find Selection	Scrolls the currently selected event back into view should it scroll off of the list.	--	N
Auto Filter	Allows you to quickly filter the table by the selected cell value.	--	Y (toggle)
Auto Filter Off	Turns off any auto filter that has been applied.	--	Y (toggle)
Load Completed Events	By default, completed events are not loaded into the Work Agenda on startup for performance reasons. Use this button to load in completed events.	--	N
Load Completed Event...	Opens the Load Completed Event Dialog, which allows you to load a specific completed event by specifying its Event #.	--	N

Menu Option	Description	Toolbar Icon	Right-Click Y/N
Event Log...	Opens the Event Log window for the selected event.	--	Y
Switching...	Opens the <b>Open or Create New Switching Sheet</b> dialog, which allows you to create a new switching sheet or open a switching sheet associated with the selected event. This option is only available if you running Web Workspace with Web Switching Management. See <b>Open or Create New Switching Sheet</b> on page 9-59 for more information.	--	N
AMI Confirm...	Allows you to request meter pings from the AMI system for the selected event.	--	N
Show AMI Request...	Displays a list of active and completed AMI requests for the selected event.	--	N
Update ERT(s)...	Opens the Update ERT dialog so you can enter a new ERT for all selected events.	--	N
System-Wide Default ERT...	Opens the System-Wide Default ERT dialog, which allows you to view and modify the system-wide default restoration time value. (Use the Configuration Assistant to set restoration times for specific control zone/device class combinations.)	--	N
Fault Location Analysis...	Displays the Fault Location Analysis tool for the selected fault event.	--	N
Damage Assessment...	Opens the Damage Assessments tool, which displays a list of damage assessments associated with the selected event and allows you to add additional damage assessments. See <b>Damage Assessment Window</b> on page 2-18.	--	Y
Confirm Outages	Opens the Confirm Outages tool, which allows you to confirm secondary or service outages for customers associated with event devices.	--	Y
Undo Grouping	Ungroups and repredicts all calls from an event. It may be used to undo the results of manual grouping or repredict upstream/downstream. This action is not allowed for events with crews. See <b>Ungroup Events</b> on page 2-14.	--	N
Show Event Note Balloon	Enables a balloon popup that displays event notes, if they exist.		Y

**Help Menu** - The table below describes the options available on the Help menu.

Menu Option	Description	Toobar Icon
Work Agenda Help (F1)	Opens the online help system to the Work Agenda tool help content.	--

## Work Agenda Data Fields

The Work Agenda displays data in a summary row and an events list table.

### Summary Row

The summary row tabulates data for the events in the displayed (filtered) events list.

- The **Total Events in View** field displays the number of events.
- The **Est Customers Out** field displays the number of customers estimated to be affected.
- The **Calls** field displays the number of calls received.
- The **Priority Calls** field displays the number of priority calls received.
- The **Emergency Customers Out** field displays the number of impacted emergency customers.
- The **Medical Customers Out** field displays the number of impacted medical customers.
- The **Key Customers Out** field displays the number of impacted key customers.
- The **Crews En Route/Onsite** field displays the number of crews en route or onsite.

### Events List

The Events List provides a tabular view of events. The filter and sort criteria are displayed above the table; the Work Agenda tab displays the selected list view/filter (*e.g.*, To Do, All, In Progress, etc.).

### Columns

- The first, unnamed column, holds event status symbols.
- The **Status** column displays the status assigned to the event. See **Event Status Codes** on page A-1 for a complete list of status codes and descriptions.
- The **Event #** column displays the number the system has assigned to the event.
- The **Feeder** column displays the name of the feeder associated with the event.
- The **E/H** column indicates whether or not the event is an emergency or hazardous condition. An “E” in this column denotes extreme emergency, and an “H” in this column denotes hazardous.
- The **Start Date** column contains the date and time the event began.
- The **# Out** column contains the number of customers experiencing an outage for the event.
- The **Run CMI** column contains the current customer minutes interrupted value for the event. Note that this value is automatically updated once a minute. By default, the CMI is 0 for restored events, but this can be customized
- The **# Calls** column contains the number of calls received for the event.
- The **Clues** column contains the clue codes for the calls received, if any.

- The **Phases Out** column contains the phases predicted out for the event.
- The **Device** column contains the name of the device associated with the event.
- The **Location** column contains either the address of the first customer that called if the event is a service outage or non-outage or the feeder location of the device if the event is a device outage.
- The **Crew** column contains the crew ID(s) of the associated crew(s).
- The **Est Restore Time** column contains the estimated restoration time (ERT) for the event.
- The **Est Src** column contains the source of the ERT for the event. The possible source values are:
  - N – none (no ERT)
  - S – Oracle Utilities Network Management System – Storm Management
  - P – Oracle Utilities Network Management System Storm Management “non-published global ERT”
  - O – Oracle Utilities Network Management System Storm Management “onsite ERT” used when the crew is en route or onsite. If the crew is en route, the ERT includes the travel time plus the repair time; if the crew is onsite, the ERT only includes the repair time.
  - G – Oracle Utilities Network Management System Storm Management “published global ERT”
  - C – User-entered (assumed to have been provided by the crew)
  - I – Initial default ERT
- The **Prediction Type** column contains the type of prediction (*e.g.*, New, Revised, Device Operation, etc.) or type of notification for NFY events (*e.g.*, Crew contact required).
- The **Restore Date** column contains the actual restoration date and time of the event.
- The **# Crit** column contains the total number of critical customers experiencing an outage for the event.
- The **# EMR** column contains the number of emergency customers experiencing an outage for the event.
- The **# MED** column contains the number of medically urgent customers experiencing an outage for the event.
- The **# KEY** column contains the number of key customers experiencing an outage for the event.
- The **Evt Type** column contains a description of the type of event. See **Event Type Codes** on page A-4 for a complete list of event type codes and their descriptions.
- The **Work Queue** column contains the name of the work group queue that the event has been referred to.
- The **Region** column contains the control zone region where the event occurred.
- The **Branch** column contains the control zone branch where the event occurred.
- The **Substation** column contains the control zone substation where the event occurred.
- The **Plan #** column contains the switching sheet number associated with the event, if any. The switching sheet number is prefixed by the switching sheet type (such as “Plan” or “Emer”).
- The **Grp Type** column indicates whether the event is manually grouped or related. The possible types are:

- GRP – manually grouped
- REL – manually related
- The **Rel Event #** column contains the event number of the parent or lead event when the event has a special relationship with one or more other events.
- The **Rel Type** column contains the type of special relationship that the event is involved in. The possible types are:
  - L – lead event of a partial restoration
  - M – momentary
  - N – nested
  - P – non-lead event of a partial restoration
  - R – manually related
  - S – switching (relationship between switching jobs and planned outages)
- The **Sent to Mobile** column indicates whether or not the event is in a state that makes it eligible to be sent to the mobile system.
- The **AMI Request** column indicates whether or not a request was made to the AMI system to verify power to the meter.
- The **Dmg Asmt** column contains a value of 'Y' if the event has damage assessment associated with it; otherwise, the column contains 'N'.
- The **Appt Type** column indicates the type of appointment scheduled using the types in the Web Call Entry application. See **Appointment Request** on page 3-5 for more information on scheduling appointments.
- The **Appt Range** column indicates the window of time given for a scheduled meeting. See **Appointment Request** on page 3-5 for more information on scheduling appointments.
- The **Appt Date** is the date an appointment has been scheduled for a customer meeting. See **Appointment Request** on page 3-5 for more information on scheduling appointments.

## Filtering, Sorting, and Selecting Columns


When you right-click the events table header in the Work Agenda table header, a pop-up menu displays a list of options that allow you to perform the following functions:

Menu Option	Description
Filter...	Displays the Filter Dialog so you can create, modify, apply, and save user-defined filters. See <b>Using the Filter Dialog</b> on page 1-12.
Sort...	Displays the Sort Dialog so you can modify the default sort. See <b>Using the Sort Dialog Box</b> on page 1-11.
Select Columns...	Opens a dialog that displays a list of columns that can be displayed in the Work Agenda table. A checkmark appears next to columns that are currently displayed. To remove a column from the table, uncheck the box. To add a column that is not currently displayed, check the box. Click OK to exit.
<p><b>Note:</b> These settings are applied immediately and affect only the current user session. To save these settings as the default view for the Work Agenda (for the currently logged-in user), select <b>Save Preferences</b> from the <b>Web Workspace Preferences</b> menu.</p>	

The Work Agenda table supports **Quick Sorting**, **Dynamic Filtering**, and **Auto Filtering**.

## Acknowledging Events

To acknowledge an event, complete these steps:

1. Select the row of the event with NEW, S-NEW, P-NEW, M-NEW, or RED status in the Work Agenda Events List.
2. Click on the **Acknowledge** toolbar button (  ) or select **Acknowledge** from the Actions menu. The event becomes acknowledged and its status changes accordingly.

## Using the Web Workspace Viewer

The Viewer presents a graphical representation of the electrical distribution system, with additional symbology for conditions such as outages, crew locations, notes, tags, etc. The Viewer dynamically updates with condition and electrical distribution changes.

This section includes the following topics:

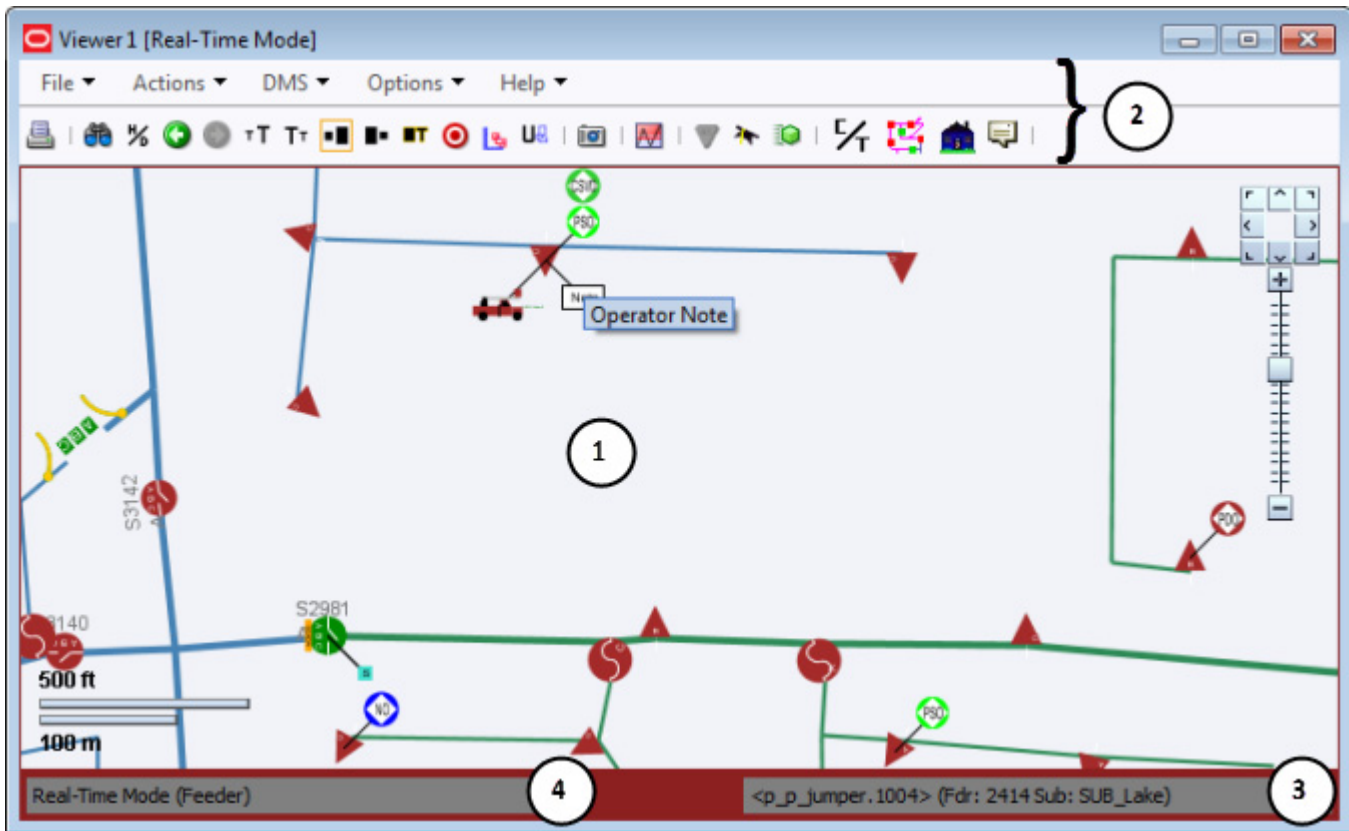
- **Starting the Viewer**
- **Understanding the Viewer**
- **Displaying Device Details**
- **Changing the Coloring Mode**
- **Searching and Loading Viewer Maps**
- **Navigating in the Viewer**
- **Viewer Focus**
- **Using Feeder Focus**
- **Using Lens Windows**
- **Real-Time and Study Mode**
- **Selecting Devices**
- **Identifying Symbology**
- **Hiding and Displaying Viewer Objects**
- **Executing Traces**
- **Using the Commissioning Tool**

## Starting the Viewer

To open a Viewer, select the **Viewer 1...** option on the Web Workspace Tools menu. To start a second Viewer, select **Viewer 2...** After you have opened the Viewer, selecting the menu option will change the focus to that Viewer.

## Understanding the Viewer

The following diagram shows the functional areas of the Viewer:



### Viewer Functional Areas Legend:

- 1: Drawing Area
- 2: Menus and Toolbar
- 3: Message Area
- 4: Real-Time and Study Mode Indicator with View Setting

### Drawing Area

The Viewer's drawing area displays dynamic maps that reflect the status of the system. The lines (used to represent conductors) and the icons (used to represent devices and conditions) are called *symbols*; the conventions that govern symbols are referred to as *symbolology*.

Certain condition symbols, such as event type or note indicator, provide tooltips indicating the symbol's meaning. For example, as shown in the illustration above, the Note symbol's hover text is *Operator Note*.

### Message Area


The Viewer's message area displays device aliases, feeder names, and substation names.










## Menus and Toolbar






The Viewer's menus and toolbars provide access to common functions.

### File Menu

Option	Description	Toolbar Button
Print	Opens the Print Preview window, which allows you to print the contents of the Viewer window.	
Exit	Exits the Viewer.	--

### Actions Menu

Option (Keyboard Shortcut)	Description	Toolbar Button
Search	Opens the Search dialog box, which allows you to enter search criteria and execute a search in the Viewer.	
Hide/Display...	Opens the Hide / Display dialog box, which allows you to select the types of information that are displayed on the map. See <b>Hiding and Displaying Viewer Objects</b> .	
Back	Moves to the previous view before a pan, zoom, or object focus operation (if any) changed the focus location in the Viewer. This button functions similarly to a web browser's back button, storing a dozen "views."	
Forward	Moves to the next view if the <b>Back</b> button has been used. It functions similarly to a web browser's forward button.	
Feeder Focus [F]	Shows only the selected device's feeder at a zoom level that will allow the Viewer to display the feeder in its entirety.	--
Show Lens	Opens a Lens window zoomed in on selected device. See <b>Using Lens Windows</b> on page 1-41.	--
Zoom In [Z]	Zooms in on the map to show a smaller area in more detail.	--
Zoom Out [Shift-Z]	Zooms out on the map to show a larger area.	--
Text Bigger [Shift-T]	Increases the text font size.	
Text Smaller [T]	Decreases the text font size.	
Symbols Bigger [Shift-S]	Increases the size of symbols.	

Option (Keyboard Shortcut)	Description	Toolbar Button
Symbols Smaller [S]	Decreases the size of symbols.	
Attributes Farther [Shift-A]	Displays attributes (e.g., flags, note symbols, etc.) away from the device. Each subsequent action moves the attribute farther away.	--
Attributes Closer [A]	Displays attributes closer to the device.	--
Reset Scale [R]	Resets the size of symbols and text to its default size.	--
Fixed Size	This mode will keep the symbol and text sizes the same regardless of the zoom level.	--
Focus	Focuses the Viewer on selected devices or devices associated with selected events. See <b>Viewer Focus</b> on page 1-38 for details.	
Load Maps [M]	Allows you to explicitly load additional maps to display more of the surrounding area or additional detail.	
Unload Maps [Shift-U]	Unloads all maps, not just those in the visible drawing area.	
Unload Maps on Map Load	Selection that sets the Viewer to unload previously loaded maps before loading another map.	--
Commissioning Tool...	Opens the Commissioning Tool, which allows you to commission a device that is currently in construction, or to decommission devices currently marked for removal.	--
Feeder Name(s) [Shift-F]	Causes the right status bar to display the names of the feeders and substations feeding the selected device for parallel or meshed conditions. If the device isn't parallel or meshed, it doesn't add to the display.	--
Save View Area...	Saves the viewing area after prompting for a name for the saved area. If a view area already exists with that name, you will be asked if you want to replace it.	
Delete View Area...	Deletes the viewing area after prompting for confirmation.	--


### DMS Menu



This menu is only displayed if the Distribution Management System is licensed for your system.

Option	Description	Toolbar Button
Feeder Load Management...	The <b>Feeder Load Management</b> button opens the Feeder Load management window.	

Option	Description	Toolbar Button
Suggested Switching...	Displays the Suggested Switching wizard. This option is only enabled if a device is currently selected in the Viewer and you are using Web Workspace with Web Switching Management. See <b>Using Suggested Switching</b> on page 10-11.	--
Volt/VAr Optimization...	Displays the Volt/VAr Optimization wizard. This option is only enabled if a device is currently selected in the Viewer and you are using Web Workspace with Web Switching Management. See <b>Using Volt/VAr Optimization</b> on page 10-15.	--

### Options Menu

Option	Description	Toolbar Button
View Phases	Sets the Viewer's drawing areas to show conductor coloring by phases.	--
View Feeders	Sets the Viewer drawing area to feeder coloring mode.	--
View Currents	Sets the Viewer's drawing areas to show coloring by the current range. See <b>Chapter 10, Viewer Power Flow Information Visualization</b> on page 10-2, for more information.	--
View Loading	Sets the Viewer's drawing areas to show coloring by load ( <i>i.e.</i> , the per unit current range). See <b>Chapter 10, Viewer Power Flow Information Visualization</b> on page 10-2, for more information.	--
View Voltage Per Unit	Sets the Viewer's drawing areas to show coloring by voltage per unit ( <i>i.e.</i> , the per unit voltage range). See <b>Chapter 10, Viewer Power Flow Information Visualization</b> on page 10-2, for more information.	--
View Nominal Voltages	Sets the Viewer's drawing areas to show coloring by the nominal voltage range. See <b>Chapter 10, Viewer Power Flow Information Visualization</b> on page 10-2, for more information.	--
Show Flow Direction [D]	Overlays flow direction arrows the selected view option. See <b>Chapter 10, Flow Direction</b> on page 10-4, for more information.	--
Big Symbols [Shift-B]	Allows you to toggle Big Symbols on or off. Displays a checkmark if big symbols are currently displayed.	--
Real Time	If you are currently in Study mode, select this to switch to real-time mode. If you are currently in real-time mode, this is grayed. For more information on real-time mode, see <b>Real-Time and Study Mode</b> on page 1-42.	





Option	Description	Toolbar Button
Study	If you are currently in real-time mode, select this to switch to Study mode. If you are currently in Study mode, this is grayed. For more information on study mode, see <b>Real-Time and Study Mode</b> on page 1-42.	
Reset Study Session...	Resets the study session to either the current real-time model or the nominal model.	--
Close Study Session	Closes the current study session.	--
Power Flow Real-Time Options...	The <b>Power Flow Options</b> button opens the Power Flow Options dialog.	

### Help Menu.

Option	Description	Toolbar Button
Viewer Help [F1]	Opens online help content for the Viewer.	--
Legend	Opens the Viewer Legend window that displays information about the current Viewer view. See <b>Changing the Coloring Mode</b> on page 1-35 for more information.	--

### Additional Toolbar Options

The following toolbar options do not have corresponding menu options:

Option	Description
	The <b>Control Tool</b> button toggles the Control Tool mode on or off. If on, this mode opens the Control Tool dialog box when you select a device in the Viewer. This button also toggles off the <b>Trace</b> button (exiting Trace mode) if it was on.
	The <b>Trace</b> button toggles the Trace mode on or off. If on, this mode opens the Trace dialog box when you select a device in the Viewer. This button also toggles off the <b>Control Tool</b> button (exiting Control Tool mode) if it was on.
	The <b>Supply Points Mode</b> button causes the Viewer to display supply points for potential selection. This allows supply points to be graphically grouped and added to an outage.
	The <b>Device Details</b> button toggles device details on or off. See <b>Displaying Device Details</b> on page 1-34.

## Saving Viewer Preferences

When the Viewer options have been adjusted to render symbols, text, and window information as desired, select **Save Preferences** from the **Web Workspace Preferences** menu to save the options for subsequent sessions.

## Context-Sensitive Pop-Up Menu Options

When you right-click on certain objects in the Viewer window, a pop-up menu displays a list of options available for the selected object.

### Crew Options

The following options are displayed when you right-click on a crew in the Viewer window. These options are only available for AVL crews.

Menu Option	Description
Assign	Assigns the crew selected in the Viewer to the event currently selected in Work Agenda. See <b>Assigning a Crew</b> on page 2-31 for more information.
En Route	Puts the crew selected in the Viewer en route to the event currently selected in Work Agenda. This is enabled only if the selected crew is an on-shift, available, non-mobile crew that is not currently en route or onsite. See <b>Placing a Crew En Route Using the Crew Actions Window</b> on page 2-31 for more information.
Release Crew	Releases the crew selected in the Viewer from the en route/onsite event selected in the Work Agenda. See <b>Releasing a Crew from an Event</b> on page 2-39 for more information.
Update Availability...	Opens the Update Crew Availability dialog for the selected crew. See <b>Changing Crew Availability</b> on page 2-32 for more information.
Crew Info...	Opens the Crew Info dialog for the selected crew. See <b>Crew Info</b> on page 2-35 for more information.
Active Job Info...	Opens the Active Job Info dialog for the selected crew. This is enabled only if an en route or onsite crew is selected. See <b>Active Job Info</b> on page 2-37 for more information.

### Event Options

The following options are displayed when you right-click on an event symbol in the Viewer window:

Menu Option	Description
Crew Info...	Opens the Crew Info dialog for the crew assigned to the selected event.
Active Job Info...	Opens the Active Job Info dialog for the crew assigned to the selected event. This is enabled only if the crew is en route or onsite to the event. See <b>Active Job Info</b> on page 2-37 for more information.
Show En Route Location...	Shows the AVL location of the crew that is currently en route to the selected event. This option is only available for AVL crews.
Release Crews	Releases all assigned, en route, and onsite crews from the event selected in the Viewer. See <b>Releasing a Crew from an Event</b> on page 2-39 for more information.

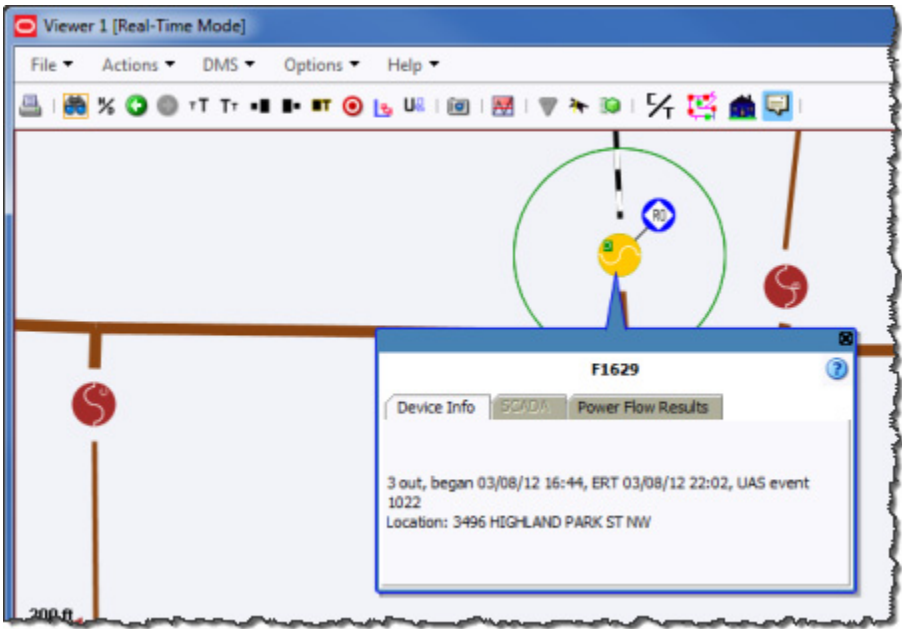
Device Options

The following options are displayed when you right-click on a device in the Viewer window:

Menu Option	Description
Control Tool...	Opens the Control Tool.
Device Details...	Displays the Device Details balloon above the selected device.
Trace...	Opens the Trace Tool, which allows you to display the path from a selected device to other devices based on specific criteria.

Displaying Device Details

**Device Details** provides information about devices selected in the Viewer. Device Details is enabled by clicking the Device Details button in the Viewer’s toolbar or by right-clicking a device and selecting **Device Details...** from the options menu.



**Note:** the Viewer’s Device Details (  ) button is highlighted when enabled.

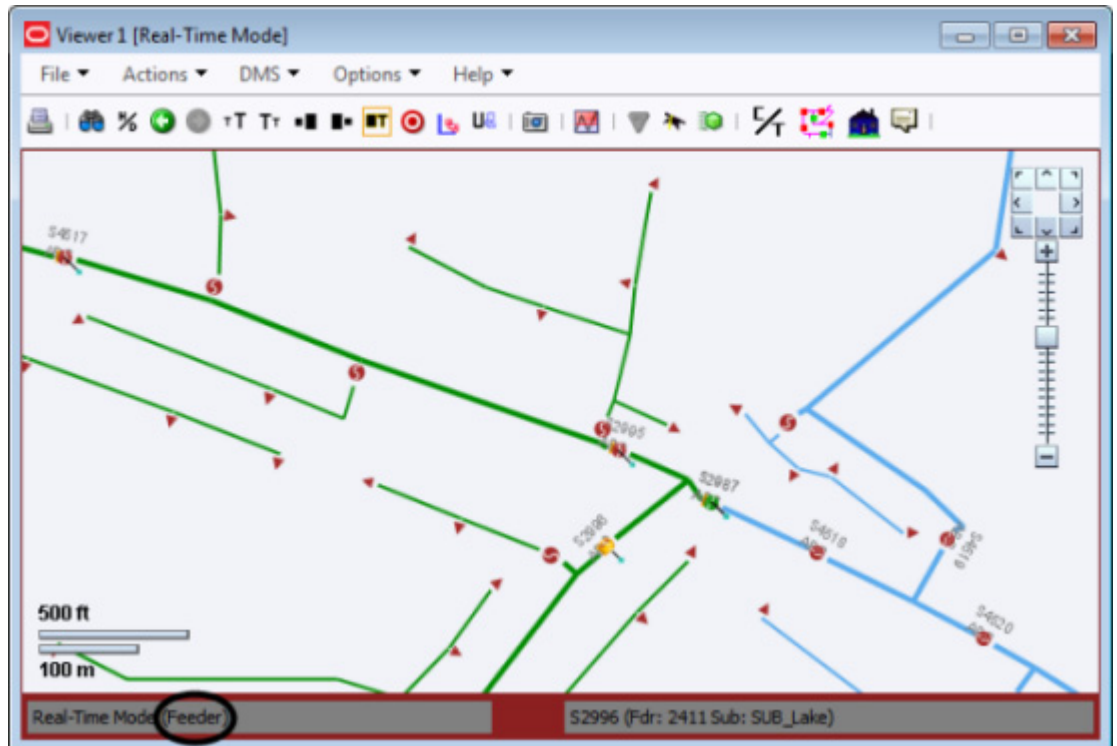
When enabled, selecting a device will automatically launch a balloon-style window above the device in the Viewer. The Device Details balloon has three tabs (Device Info, SCADA, Power Flow Results). The SCADA and Power Flow Results tab will only be enabled in systems that have implemented SCADA Extensions (see **SCADA Device Details** on page 8-4) and/or Power Flow Extensions (see **Viewing Power Flow Results in Real Time** on page 10-4), respectively.

The information contained in the Device Info tab varies depending on the type of device and its current condition, but may include event information, event notes, location, device notes, and crew information.

The  icon launches Device Details online help.

## Changing the Coloring Mode

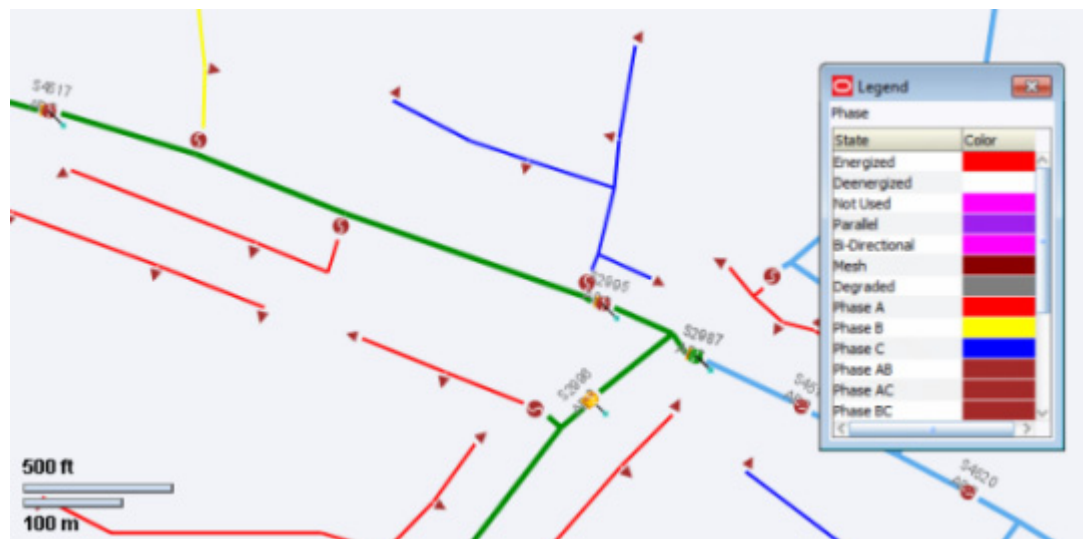
The Viewer opens in feeder coloring mode. In this mode, all conductors fed from a given feeder are displayed in the same color.



Viewer in Feeder view. Note that the view is displayed in parenthesis following the mode indicator.

To change to another coloring mode, do the following:

1. Select the view from the Options menu; for example, Options > View Phases.
2. To enable a legend for the colors, select **Legend...** from the Help menu.



Phases view with legend.

## Searching and Loading Viewer Maps

The Viewer *Search* functionality allows you to quickly focus the Viewer on an area or object.

- Search Type Option
- Search Case Option
- Search Result Limit
- Customer Information Section
  - Account #
  - Name
  - Address
  - Telephone
  - Meter Number
- Intersection
  - Street 1
  - Street 2
- Feeder Name
- Device ID
- View Area
- Crew ID
- Event #

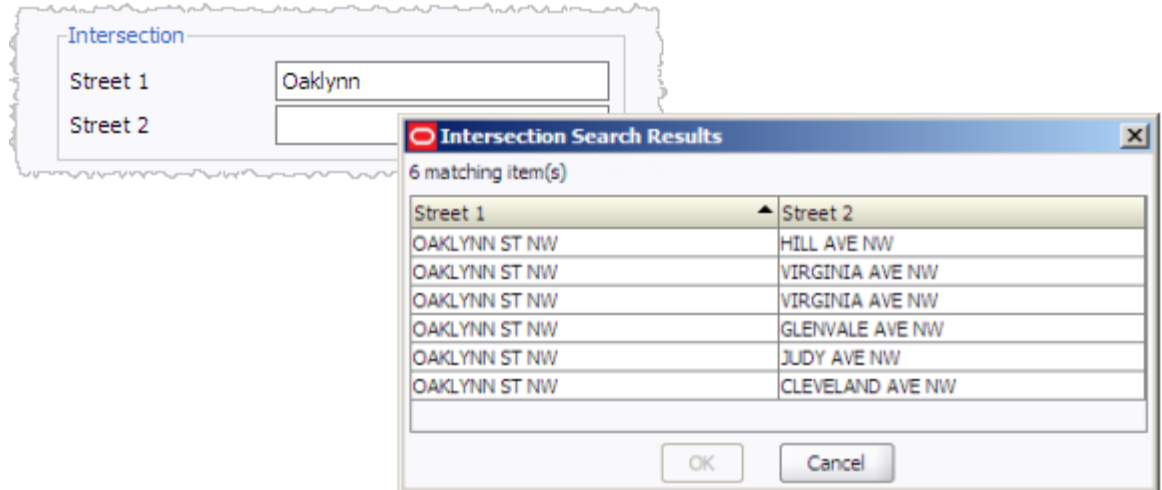
### Using the Search Tool to Locate Map Areas and Objects

To locate a particular area or object in the Viewer, complete these steps:

1. Click the **Search** button on the Viewer toolbar or from the Actions menu. The Search dialog box opens.
2. Select the **Search Type** you wish to perform (Exact Match, Wildcard Before, Wildcard After, Wildcard Before and After, Soundex) from the **Search Type** option menu.
3. Select the **Search Case** option you wish to use (Case Insensitive, Case Sensitive) from the **Search Case** option menu. Case Sensitive means that “elbow” won’t match “ELBOW”.
4. Enter your search result limit in the **Search Result Limit** field (default value is 100).
5. Click the desired search field and either enter search criteria **or** leave the field blank to return all possible values (up to the search result limit).
6. Press **ENTER** or click the **Search** button.
7. If there is *only one match*, the Viewer will shift focus to the search result. If there are multiple matches, a Search Results dialog box displays the search results and the Search dialog box closes.



For example, an Intersection search using the term Oaklynn returns six matches.




8. If there are multiple matches, select a row in the Search Results dialog box and click the **OK** button. The object appears centered in the Viewer and the Search Results dialog box closes.

**Note:** If none of the results are what you wanted, click **Cancel** in the Search Results dialog box. The Search Results dialog box closes and the Search dialog box is redisplayed.


## Loading and Unloading Viewer Maps

Once you have located an area or object using the Search dialog box, you can navigate to an adjacent area where the maps are not yet loaded. From here, you can load all the maps that should appear in the drawing area.

To load maps, do one of the following:

- Select **Load Maps** from the Actions menu, or
- Press the M key, or
- Click the **Load Maps** button (  ) on the toolbar.

To unload all maps (not just those in the visible drawing area), do one of the following:



- Select **Unload Maps** from the Actions menu, or
- Press Shift-U, or
- Click the **Unload Maps** button (  ) on the toolbar.

**Note:** unless your system is configured to unload maps with each focus, any loaded maps will continue to be loaded until you explicitly unload maps or you switch mode (*i.e.*, from study to real-time or from real-time to study).

If there are more devices displayed than the configured maximum, which is 500,000 in the product configuration, the viewer will unload the maps that have the oldest access time to get the total under the limit.

## Navigating in the Viewer

There are a number of ways to navigate around the Viewer:

- Pan left, right, up, down, or diagonally in the map using the pan compass.
- Use the  and  buttons to zoom in and out. You can also drag the zoom slider (shown below) toward the plus sign to zoom in or toward the minus sign to zoom out.

The scale indicator (shown below) displays the current zoom scale.

The scale is hidden if a schematic view, such as a substation, is selected.

- Navigate using your mouse controls, as described in the next section.
- Navigate to a device using the **Focus** feature. See **Viewer Focus** on page 1-38 for details.

### Navigating Using Mouse Controls

There are various mouse controls you can use to navigate within the Viewer. The following table shows all of the mouse commands for the Viewer.

To...	Do this...
Select an object	Click the object.
Select multiple objects	Shift-click and drag to extend the selection rectangle around the area with the object you want to select. The <b>Select a Device</b> dialog will open listing all of the devices in the selection area.
Box Zoom	Box Zoom allows you to focus on an area. Click and hold the middle mouse button to begin drawing the rectangle and release it to complete drawing the rectangle; the Viewer will display the area selected at a zoom level that allows the area to fill the Viewer drawing area.
Zoom out	Scroll upward with the scroll wheel, if available.
Zoom in	Scroll downward with the scroll wheel, if available.
Open the Control Tool	Double-click the object.
Move the map	Click and drag the map to a new location.

## Viewer Focus

The Viewer's **Focus** option is context aware and will function according to your selection.

- If you select an object in the Viewer, clicking the Viewer Focus button will focus on that object.
- If you select an event in the Work Agenda and click the Viewer Focus button, the Viewer will focus on the device/object associated with the event.

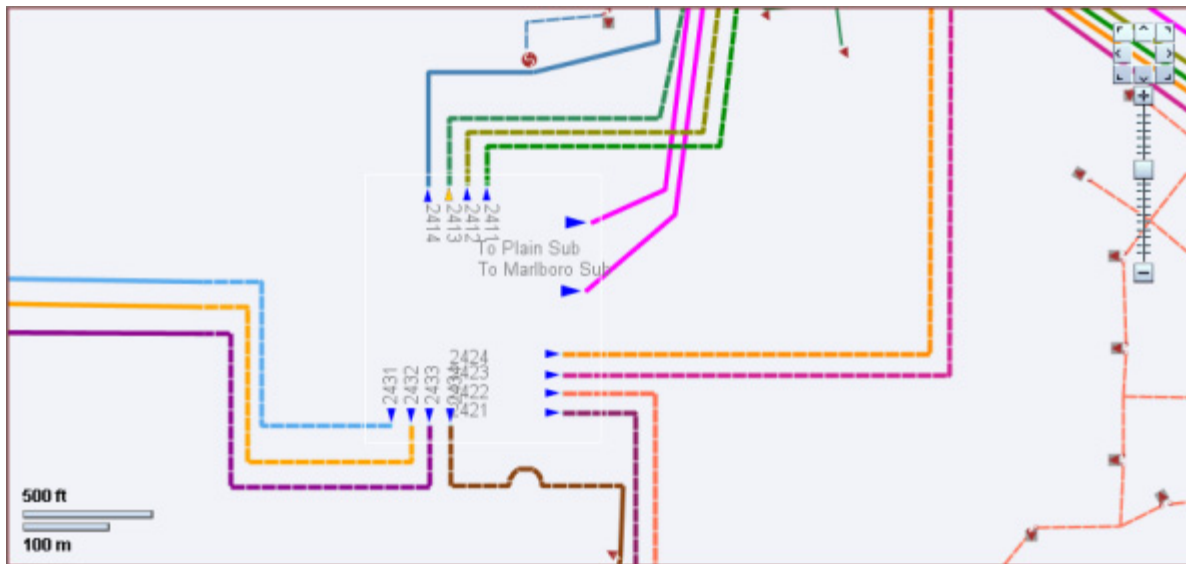
### Focus on Viewer Selection

If you select an object in the Viewer and click the Focus button, the Viewer will center the object and zoom in/out as necessary. If the object is part of a schematic view, the first Focus action will display the object in the schematic view. Each successive click will cycle the Viewer through alternate schematic views, if available, until it cycles back to the standard topology view.

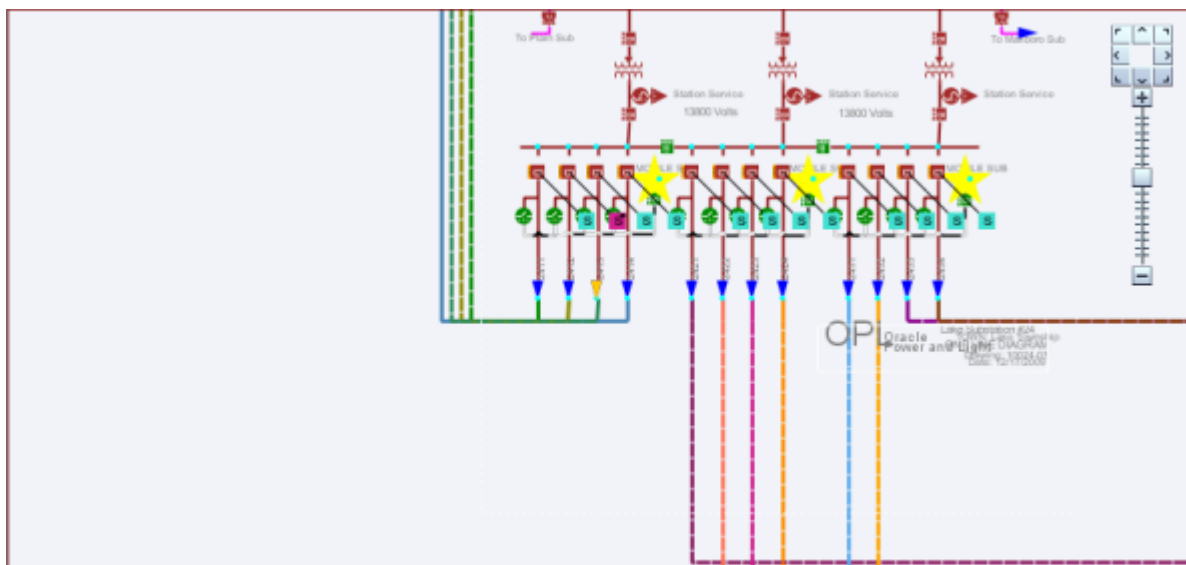
**Note:** Viewing schematics may not reflect the current (real-time) state of the network since the schematic views are generated by the model build process.

**Example: Substation Breaker Focus**

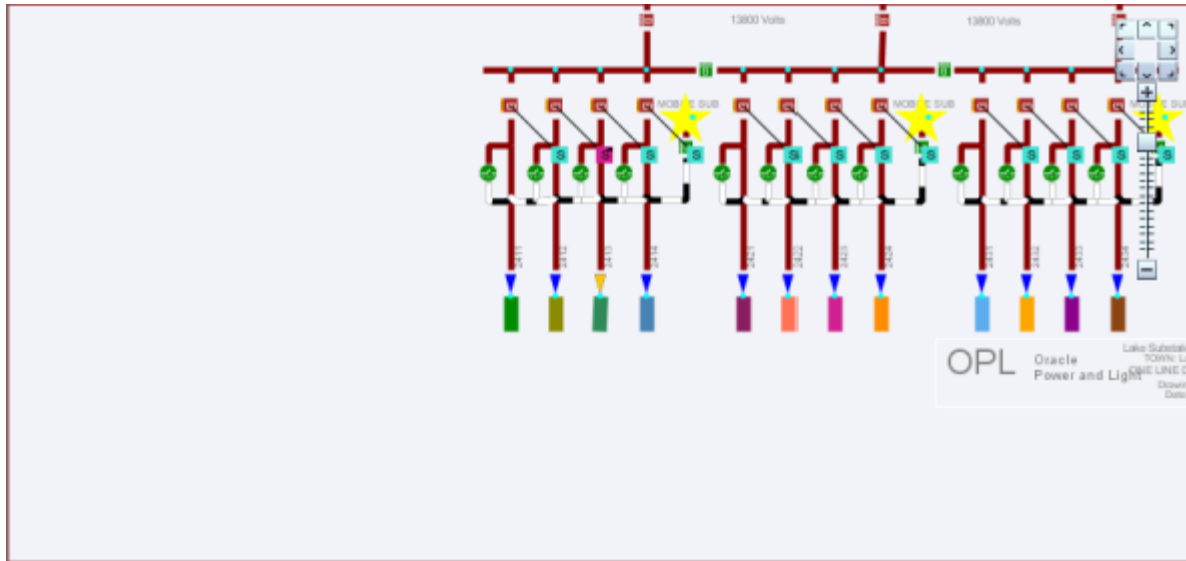
1. A substation breaker is selected.



2. Click Focus; the first schematic view appears with the device centered in the schematic view.



- Click Focus; a more zoomed in schematic appears that provides more detail on the substation, but without the feeder lines.



- Click Focus to return to the original network view.

### Focus on Selection Made in another Window

When you make a selection of an event in another window (*e.g.*, the Work Agenda) and click the **Viewer Focus** button, the Viewer will find the device and focus the drawing area on it.

## Using Feeder Focus

At times, you may want to view only the devices on the same feeder as the selected device. The Viewer's Feeder Focus feature traces from the selected device back to its feeder breaker and to all downstream devices on the same feeder.

**Note:** Feeder Focus uses the real-time status or the status from the current study session. It does not display devices that may be part of the feeder in the nominal configuration but not currently part of the feeder.

Feeder Focus should not be used at times of heavy system activity such as those that occur when there are many outages in the system caused by major events and storms.

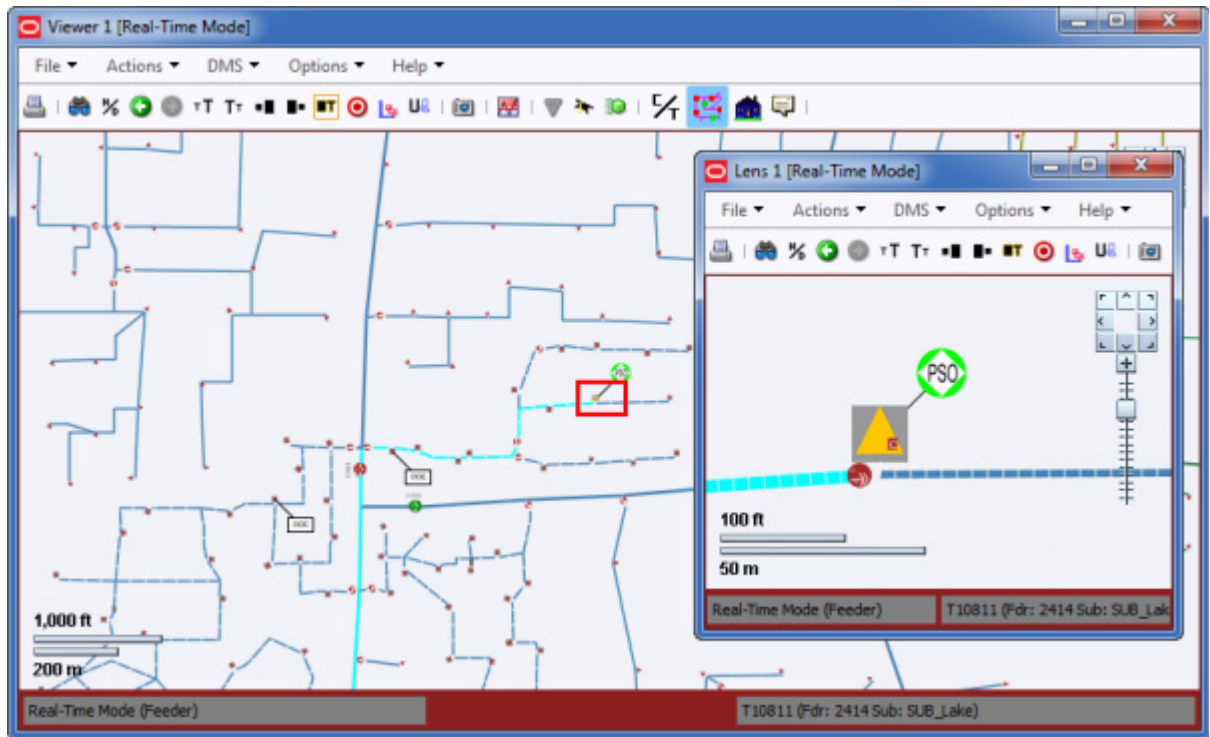
To use the Feeder Focus feature, complete these steps:

- Select a device in the Viewer drawing area.
- Select **Feeder Focus** from the Actions menu or press the F key (the keyboard shortcut). All symbols disappear except the feeder the device is on.
- To turn Feeder Focus off and show all the symbols again, press F.

Unlike tracing, no other electrical devices are shown except those on the selected feeder. The Feeder Focus will not include de-energized downstream devices. While in Feeder Focus, you can still use Hide/Display, Declutter, and Big Symbols.

## Using Lens Windows

The Viewer's Lens functionality allows you to start a “mini-Viewer” window that is focused and zoomed in on a selected device. To start a Lens window, select a device in the Viewer and select **Show Lens** from the Viewer's **Actions** menu. The Lens window will open zoomed in on the device.



### Behaviors of the Lens Window and Viewer Lens Area

The area displayed in the Lens window is indicated by a red rectangle in the Viewer's Drawing Area. The red rectangle may be moved directly in the Viewer by clicking and dragging. As the rectangle moves, the Lens window will update to show the area inside the rectangle. Likewise, panning and zooming in the Lens window will be reflected by position and size of the rectangle in the Viewer.

When the Lens is started, its text size, symbol size, attribute size, coloring rule, big symbols, and power flow arrow settings are all synchronized with the Viewer; thereafter, the Lens settings are independent. If you want to resynchronize the Lens settings with the Viewer settings, close and reopen the Lens. Note that real-time/study mode and tracing are always synchronized between the Viewer and the Lens.

## Real-Time and Study Mode

**NMS** applications start in real-time mode, where every action you perform is applied to the real-time model and displayed to all users. Certain windows (the Viewer and the Control Tool) allow you to change to study mode, where your actions are reflected in your study session on your workstation, but not recorded in the real-time model. Study mode is especially useful in “what if” studies, when you need to evaluate the effects of an action before you record it in real-time.

When in real-time mode, the Viewer displays status, topology, and condition information based on real-time operations information. All changes to these items made by any user in real-time mode are reflected on all real-time Viewers in the system.


When in study mode, the Viewer displays only status and topology changes you make on your workstation. Changes made in your study session are not reflected in the real-time model, and likewise changes made in real-time are not reflected in your study session.

A study session is created for a specific workstation the first time you put the Viewer into study mode. The study session is initially created as a copy of the current real-time model. From that point on, changes in the study session and real-time are independent of each other. You can reset the study session to current real-time by using the Study Session Control tool. In addition, some Web Switching Management actions can also cause study session resets. Please refer to the Web Switching Management chapter for more information.

**Note:** It is recommended that you reset study session(s) to real-time as often as makes sense (*e.g.*, when starting a new switching plan, testing a new ‘what if’ scenario, etc.). This is especially important during high load periods (*e.g.*, a storm).

### Switching to Study Mode

To toggle the Viewer to study mode, do one of the following:


- Select **Study** from the Options menu, or
- Click the study mode () button on the toolbar.

The Viewer window borders change color to gray.

- You can reset the study session to either the current real-time model or the nominal model using the Viewer’s **Reset Study Session...** button in the **Options** menu.

### Switching to Real-Time Mode

To toggle the Viewer back to real-time mode, do one of the following:

- Select **Real Time** from the Options menu, or
- Click the real-time () button on the toolbar.

The Viewer window borders and dialog boxes change color back to red.

## Selecting Devices

### Device Selection

To select a device in the Viewer, click the device symbol. (Note that the Viewer will select the highest priority device that is closest to the mouse but still within the configured selection-radius.)


Problems with device selection may occur if the selection-radius is set too high and if an area has a multiple devices in close proximity. If that is the case, you may want to select multiple devices using Box Selection and choose the device from the **Select a Device** window.

### Box Selection

Box selection is used to select a device from an area containing multiple devices. To perform a box selection, Shift-click and drag in the Viewer drawing area to create a rectangular selection box. When you release the mouse, the **Select a Device** window opens and is populated with all devices within the selection area. Select any device in the list to highlight it in the Viewer; highlighting changes the device symbology to the selection color, but the device is not selected until a selection action is initiated.

**Select a Device** provides the following actions:

- **Select** - selects the highlighted device and closes the window.
- **Control Tool** - selects the highlighted device, opens its Control Tool, and closes the window.
- **Device Details** - selects the highlighted device, opens the Device Details window above the device in the Viewer, and closes the window.
- **Cancel** - closes the window. The last highlighted device, if any, will remain highlighted in the Viewer, but will **not** be selected for subsequent Viewer actions.

**Note:** only a single device can be selected at any given time unless the Viewer is in Supply Points mode. When in Supply Points mode, Box Selection does not open the **Select a Device window**; instead, all supply points inside the selection area are selected. To enable Supply Points mode, click the  button.

### Polygon Selection

Polygon selection is an advanced form of box selection. To begin a polygon selection, press the Alt key and click the Viewer drawing area to place the first anchor point; continue to press Alt and click to add additional vertices. To complete the polygon, press Alt and right-click to connect the last vertex to the first vertex. Once the selection polygon is complete, the **Select a Device** window will appear listing all devices that were inside the area.

**Note:** in Supply Points mode, all supply points inside the polygon are selected. To enable Supply Points mode, click the  button.

### Multiple Selections

If you are in Supply Points mode, you can use Box Selection or Polygon Selection to select multiple supply points. To add a supply point to your selection press the Control key and click the supply point; likewise, to remove a supply point from your selection, press Control and click a selected supply point. You may also add multiple supply points to your selection by pressing the Control key while performing a box selection.

## Identifying Symbology

### Device Symbology

Changes in the status of a device (*e.g.*, switches, fuses, breakers, etc.) are reflected by changes in symbology. For example, a closed switch is a different color and shape than an open switch.



Switch in the closed state (left) and open state (right).

### Condition Symbology

Dynamic conditions on a device (*e.g.*, “predicted service outage,” “crew on-site,” “notes,” etc.) are indicated with specific symbols attached to the device to which the conditions apply.

Condition symbols display in specific areas around a device or object. The following table provides examples of where condition symbols display in relation to the device they are attached to. The following figure displays the Viewer with probable device outage, crew on-site, note and tag conditions.

Area	Symbols
Above Left	Tags
Above Right	Probable Service/Device Outages Real Outages
Below Left	En route/Onsite Crews
Below Right	Notes Call Clues



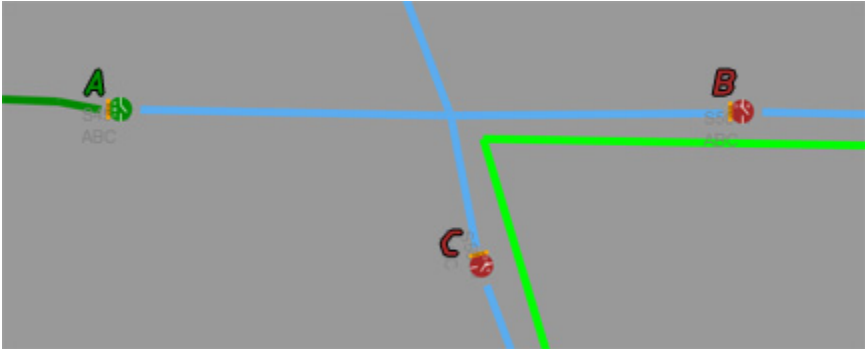
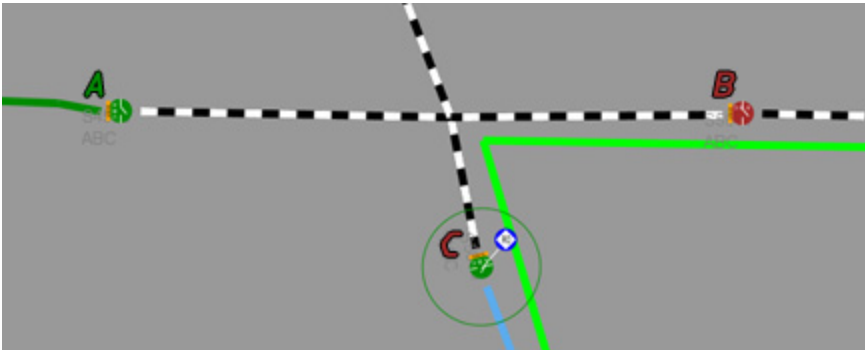
Conductor Symbolology


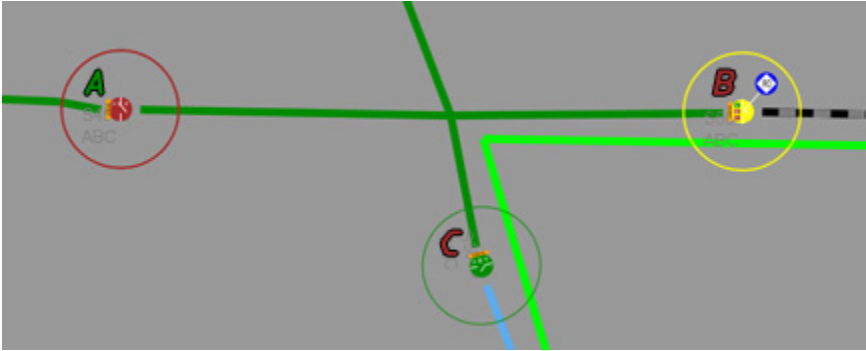
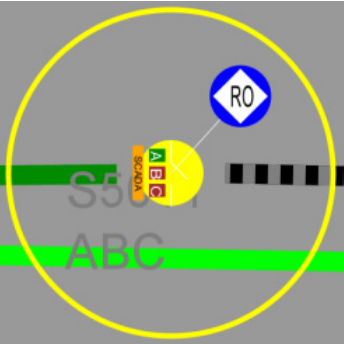
Conductor symbolology changes color, dash patterns, and thickness for different types of conductors and topology states.

Symbology	Line Pattern	Color
Overhead Line	Solid	Varies
Underground Cable	Dashed	Varies
Deenergized	Dashed	Black-White
Partially Energized	Dashed	Black-Grey
A Phase	Thin	Red
B Phase	Thin	Yellow
C Phase	Thin	Blue
Loop	Magenta	
Parallel	Purple	

Off-Nominal (Abnormal) Status Symbolology

The table below illustrates how symbolology identifies devices in off-nominal (abnormal) states.

Example	Description
	This illustration shows three 3-phase switches (marked A, B, and C) in their normal states. Switch A is normally open; Switches B and C are normally closed.
	When Switch C is opened, an outage is created (indicated by the RO symbol) and the downstream circuit is de-energized. The symbol for Switch C changes from red (closed) to green (open), and a green circle appears around it to indicate that it is abnormally open.

Example	Description
	<p>Switch A is closed to re-energize the circuit. The switch symbol changes to red (closed) and a red circle appears around the switch to indicate that it is abnormally closed.</p>
	<p>Opening a single phase of the normally closed Switch B, causes the device to go into a partially abnormal state, which is indicated by a yellow switch symbol surrounded by a yellow circle. The state of each phase is indicated by a color block behind the phase name. In this example, the A phase is opened and the switch shows the A with a green (open) background; the B and C phases are closed and have red backgrounds.</p>
	
	<p>The downstream circuit is partially de-energized and a real outage (RO) is created.</p>

## SCADA Symbolology


For systems with SCADA Extensions, the Viewer provides many visual cues about SCADA devices and their statuses. For details on SCADA symbolology, see **Understanding SCADA Information in the Viewer** on page 8-3.

## Viewing Big Symbols

To make the symbols for disconnects, breakers, and conditions prominent while zoomed out, click on the Big Symbols button from the Options menu. The symbols remain large even as you zoom out but will still disappear at standard Declutter levels.

## Hiding and Displaying Viewer Objects

The Viewer's Hide/Display tool allows you to display only those map elements (e.g., layers, objects, crew types) that are of interest to you. To change visibility of components displayed in the Viewer, complete these steps:

1. Click the Hide/Display (  ) toolbar button. (Alternatively, you may select Hide/Display... from the Actions menu.)
2. Select the elements that you want displayed; unselect those elements that you do not want displayed.

**Note:** Hide/Display is a configurable feature of NMS so your dialog may have different options.

3. Hide/Display options may include:
  - **Layer Groups:** defined groups of single layers listed in the **Layers** pane.
    - Above Ground
    - Underground
    - Transformers
    - SCADA Switches
    - All Electrical
    - Landbase - refers to the display of landbase data from the Map Definition Utility.
  - **Layers**
    - Overhead Conductors
    - Underground Cables
    - Manholes
    - Underground Fuses
    - SCADA Disconnects
    - SCADA Circuit Breakers
    - Other Electrical
    - Supply Nodes
    - Roads
    - Waterways
    - Other Landbase
    - Measurements - refers to SCADA measurements. For more information, see **SCADA Measurements** on page 8-1.

- **Crew Types**
    - Service & Trouble
    - Tree
    - Line
    - Eval
  - Declutter (On/Off) - see **Decluttering the Viewer** on page 1-48 for details.
  - Hide Conditions with Devices (On/Off) - see **Hiding Conditions with Devices** on page 1-48 for details.
  - Spatial Landbase - refers to the display of Spatial Landbase data from an Oracle Locator or Oracle Spatial base map defined using Oracle MapBuilder. MapBuilder is a standalone graphical tool for creating and editing styles, themes, and base maps.
  - The first drop-down allows you to define the Network Level to display. Options are:
    - All Primary (the default)
    - Backbone Only
    - Primary and Secondary
    - Backbone and Laterals
  - The second drop-down allows you configure the display of Phases. Options are:
    - All Phases (the default)
    - Multi-Phase
    - 3-Phase Only
  - The third drop-down allows you to configure the display of construction pending, decommissioning conditions, and inactive devices. Options are:
    - Hide Pending Devices (the default)
    - Show Pending Devices
4. Click the **Close** button to close the Hide/Display dialog.

## Decluttering the Viewer

The Viewer automatically hides objects based on pre-defined declutter zoom levels. This allows you to only see high-level information at higher zoom levels, removing small text and other items that are no longer readable at that zoom level. When an object is decluttered, any associated conditions and text will also be decluttered. The declutter option is enabled by default, but you can turn it off by unchecking the Declutter (On/Off) option in the Hide/Display dialog.

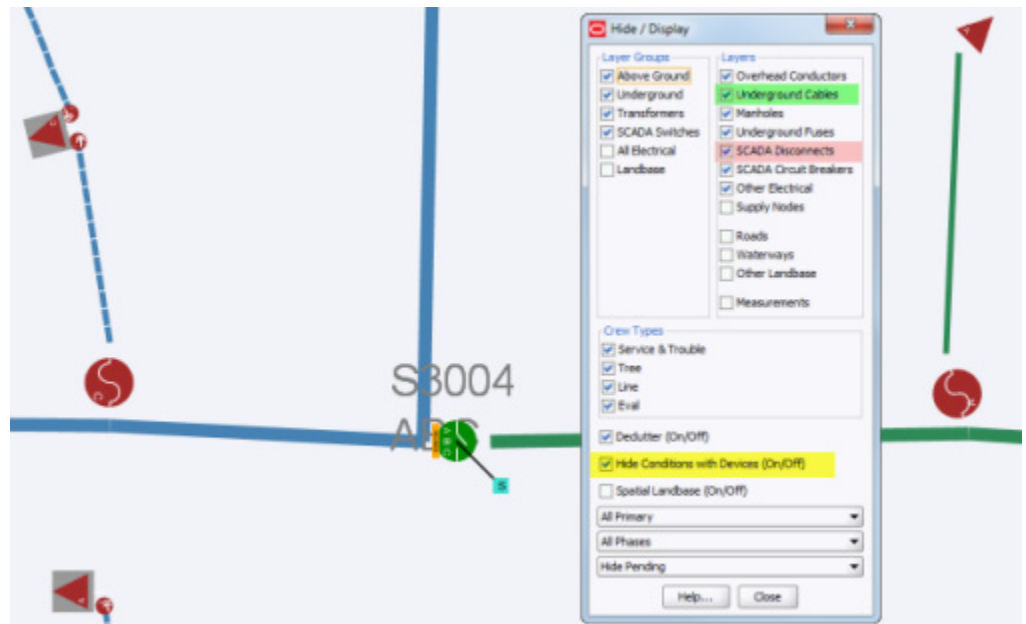
## Hiding Conditions with Devices

The Hide Conditions with Devices option, which is checked (*i.e.*, “on”) by default, will hide all conditions when their associated devices are hidden, either due to other Hide/Display options or decluttering. When not checked, the conditions will always display, even when their devices do not.

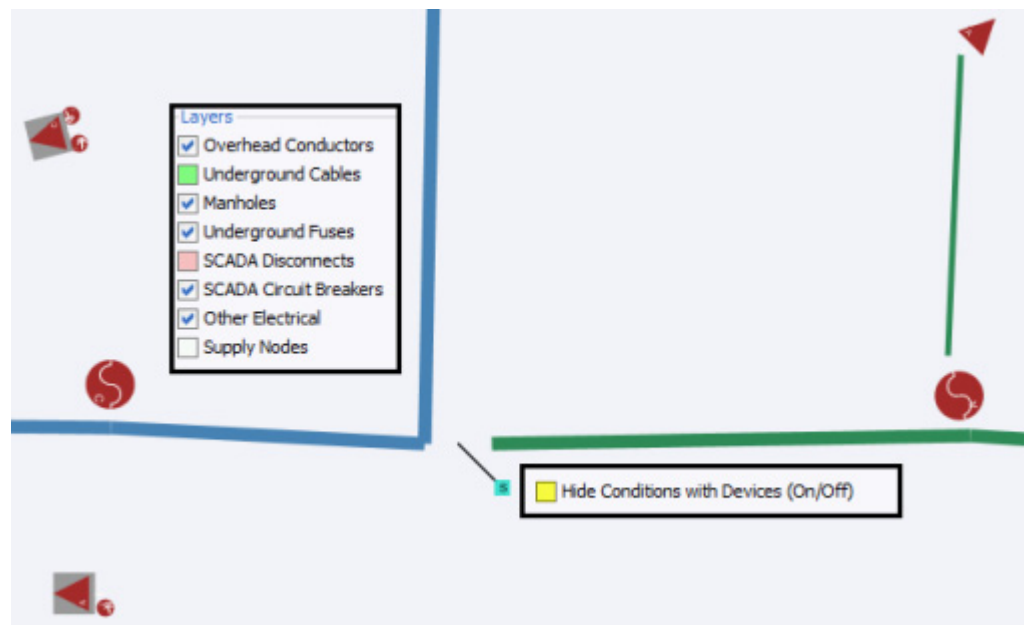
## Hide/Display Example

The following example demonstrates hiding two map elements (*i.e.*, underground cables and SCADA disconnect switches) and displaying device conditions for a device that has been hidden.

In the original state the underground cables (dashed lines) and the SCADA disconnect switch are displayed and the *Hide Conditions with Devices* features is active.



Unchecking the Underground Cables and SCADA Disconnects layers causes the Viewer to hide the underground cable and SCADA switch; unchecking the **Hide Conditions with Devices** option causes the SCADA measurement symbology to remain visible when the associated SCADA Disconnect switch is hidden.



## Executing Traces

The trace feature allows you to display the path from a selected device to other devices based on specific criteria. The trace path is displayed on the Viewer by changing all conductors that are part of the path to a thick light blue.

This section includes the following topics:

- **Trace Types**
- **Executing a Trace**
- **Inspecting Direct Connections and Navigating to Connected Objects**

For a description of the fields and buttons on the Trace dialog box, see **Using the Trace Dialog Box**.

### Trace Types

The following table describes the various types of traces.

Trace Type	Description
To Source	Traces from the selected device to its energizing source.
All Connected	Traces from the selected device to all connected devices, stopping only at energizing sources.
To Transformer	Traces from the selected device to upstream and downstream transformers.
To Switch	Traces from the selected device to upstream and downstream switches.
To Device Class	Traces from the selected device to a device class.

### Using the Trace Dialog Box


Use the Trace dialog box to execute traces of all types.

To display the Trace dialog box, click the **Trace** button on the Viewer toolbar and select an object. The Trace dialog displays the following fields and buttons:

- The first drop-down menu allows you to select the trace type, as described in the table above.
- The second drop-down menu contains the options for the trace direction:
  - **Upstream** - Constrains the trace to be only upstream of the selected device.
  - **Downstream** - Constrains the trace to be only downstream of the selected device.
  - **All** - Allows the trace to be both downstream and upstream of the selected device.

**Note:** Tracing all connected devices will automatically trace both upstream and downstream. Tracing to source will automatically trace upstream.
- The third drop-down menu allows you to select the trace mode:
  - **Current Session** - Performs the trace by using statuses currently displayed in the Viewer. This is the default.
  - **Nominal** - Performs the trace by assuming nominal statuses for all devices.
- The checkboxes enable you to select specific phase(s) to trace. By default, all available phases on the selected object are checked.

## Advanced Trace Dialog Fields

Click the **Advanced** () button in the bottom-right corner of the Trace dialog to display additional information about the selected object, including detailed topology. You can also inspect direct connections and navigate to connected objects.

When you click the Advanced button, the Trace dialog expands to display the following information:

The **Device Details** section displays the following device information:

- Device type
- Device handle
- Network Component Group (NCG)
- Map containing the device
- Display group

The **Symbol Details** section displays the following symbol information:







- Symbol class
- Symbol ID
- Coloring status
- Valid statuses
- Coloring rule

The **Connectivity Details** section displays the following connection information:

- Feeders
- Current statuses
- Nominal statuses
- Other statuses

The **Connections** section displays a list of connected nodes for the selected object. You can expand the list of connections for each node and focus the Viewer on an object in the list. For more information, see **Inspecting Direct Connections and Navigating to Connected Objects** on page 1-53.

## Trace Dialog Toolbar

- The **Trace**  button executes the trace.
- The **Clear**  button erases the trace color from the Viewer and returns to normal color.
- The **Refresh**  button performs the trace again. This is useful if devices have been operated or the model was rebuilt.
- The **Trace Focus**  button focuses the Viewer on the entire extent of the trace.
- The **Endpoint**  button focuses the Viewer on the endpoint device of the trace. It is disabled if the trace is in all directions (since there will not be a single endpoint).
- The **Help**  button displays online help for the Trace function.

## Executing a Trace

To execute a trace, complete these steps:

1. Click the **Trace** button on the Viewer toolbar to enter Trace mode.
2. In the Viewer drawing area, select the device you want to trace from. The Trace dialog opens. (See **Using the Trace Dialog Box** on page 1-50 for field descriptions.)
3. Select the trace type, direction, mode, and phase(s) for the trace, as described in the following table:


To trace...	Do this...
To all connected devices	Select “All Connected” from the drop-down and then click the <b>Trace</b> button. The Viewer traces from the device to all connected devices stopping only at an energizing source.
To connected transformers	Select “To Transformer” from the first drop-down and select the direction from the second drop-down. Click the <b>Trace</b> button. The Viewer traces from the device to all transformers in the specified direction.
To connected switches	Select “To Switch” from the first drop-down and then select the direction from the second drop-down. Click the <b>Trace</b> button. The Viewer traces from the device to the nearest switch in the specified direction.
To the energizing source	Select “To Source” from the first drop-down. Click the <b>Trace</b> button. The Viewer traces from the device upstream to the energizing source.
To a specific device class	Select “To Device Class” from the first drop-down. The Device Class field and <b>Search</b> button will be displayed. Click the Search button to open the Select Class dialog. Expand the electrical object tree and select the device class that you wish to trace to. Click <b>Ok</b> to populate the Device Class field. Click the <b>Trace</b> button. The Viewer traces to that device class.
A specific phase	Select the phase you want to trace. Select the tracing option (All Connected, To Transformer, To Switch, or To Source) and the direction, then click the <b>Trace</b> button.
Upstream	Select either “To Transformer” or “To Switch” from the first drop-down, and then select “Upstream” from the second drop-down. Click the <b>Trace</b> button.
Downstream	Select either “To Transformer” or “To Switch” from the first drop-down, and then select “Downstream” from the second drop-down. Click the <b>Trace</b> button.
Both upstream and downstream	Select either “To Transformer” or “To Switch” from the first drop-down, and the select “All” from the second drop-down menu. Click the <b>Trace</b> button. (Tracing all connected devices and tracing to the source will automatically trace both upstream and downstream.)
Using statuses currently displayed in the Viewer	Select “Current Session” from the third drop-down menu. Select the tracing option (All Connected, To Transformer, To Switch, or To Source) and the direction, then click the <b>Trace</b> button.



To trace...	Do this...
Using nominal statuses	Select “Nominal” from the third drop-down menu. Select the tracing option (All Connected, To Transformer, To Switch, or To Source) and the direction, then click the <b>Trace</b> button.

## Inspecting Direct Connections and Navigating to Connected Objects

Use the advanced fields on the Trace dialog to inspect direct connections and navigate to connected objects.

1. Click the **Trace** button on the Viewer toolbar to enter Trace mode.
2. In the Viewer drawing area, select the device you want to trace from. The Trace dialog opens.
3. Click the **Advanced** () button in the bottom-right corner of the Trace dialog. The dialog expands to display detailed connection information.
4. In the Connections box at the bottom of dialog, click the + sign to expand a node and display all connection branches.
5. Right-click a connection row and select **Focus** from the pop-up menu. The Viewer focuses on the object and colors it with the specified color. The Trace dialog displays details for the newly selected object, including a list of its connections. Refer to **Advanced Trace Dialog Fields** on page 1-51 for more information.
6. Repeat steps 4 and 5 needed to inspect more connections.

## Using the Commissioning Tool

The Commissioning Tool allows you to commission a device that is currently in construction or decommission devices currently marked for removal.



To open the Commissioning Tool, select **Commissioning Tool...** from the Actions menu in the Viewer. The Commissioning Tool displays two panels:



- The **Waiting for Approval Panel** displays a list of devices that need to be approved and indicates their current statuses (To Commission or To Decommission).
- The **Approved Panel** displays a list of approved devices that now may be removed and indicates their current statuses (Commissioned or Decommissioned).

If no pending devices are currently selected, both panels will be empty.

The status bar at the bottom of the Commissioning Tool window indicates the current real-time or study mode status.

You can perform the following actions on the devices displayed in the Commissioning Tool window:

Task	Description
<b>Approve the selected device(s)</b>	Select one or more devices in the Waiting for Approval list and click the  toolbar button (or use the right-click menu option). The devices are moved to the Approved list and their symbols in the Viewer change from red or green to gray.
<b>Focus on the device in the master Viewer window</b>	Select a single device in either list and click the  toolbar button (or use the right-click menu option).

Task	Description
<b>Remove the selected device(s) from the list</b>	Select one or more devices in either list and click the  toolbar button (or use the right-click menu option).
<b>Undo the approval for the selected device(s)</b>	Select one or more devices in the Approved list and click the  toolbar button (or use the right-click menu option). The devices are moved to the Waiting For Approval list and their symbols in the Viewer change from gray back to red or green.

## Commissioning and Decommissioning Devices

To commission or decommission sets of devices, perform the following steps:

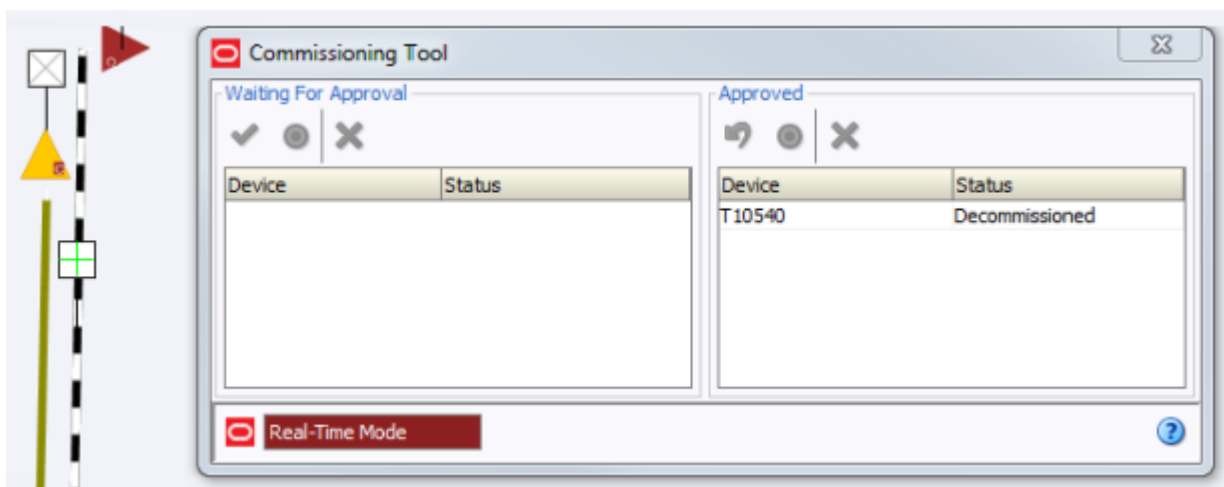
1. In the Viewer, load the pending device changes you wish to modify. You can select multiple devices.
2. Enable the **Show Pending Devices** option in the Hide/Display dialog.
3. Switch to study mode if you don't want to affect the real-time model.
4. Select **Commissioning Tool...** from the Viewer's Actions menu. Selected devices pending approval are listed in the Waiting for Approval panel.
5. Select the devices you want to commission or decommission, then click the **Approve** toolbar button.

### Note:

- Devices being decommissioned are no longer part of the topological model and are immediately deenergized, as are any devices downstream.
- Commissioned devices immediately become part of the topological model and energization is recalculated (*i.e.*, a newly device attached to an energized conductor will become energized).

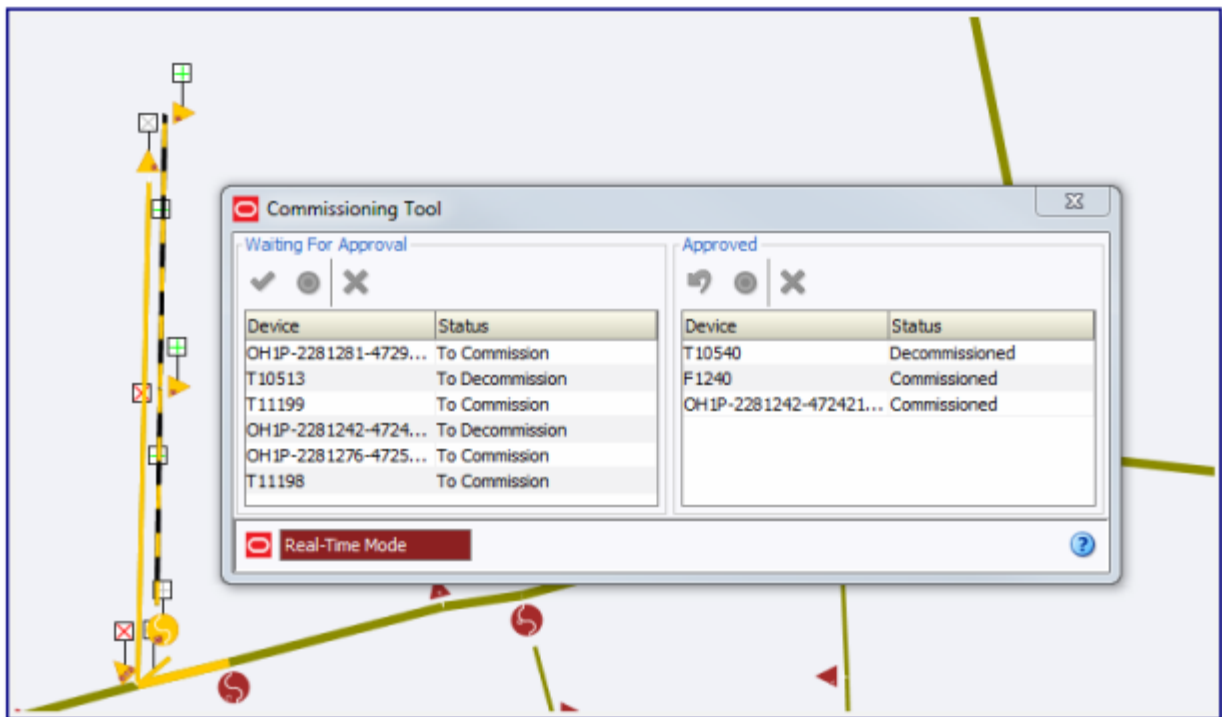
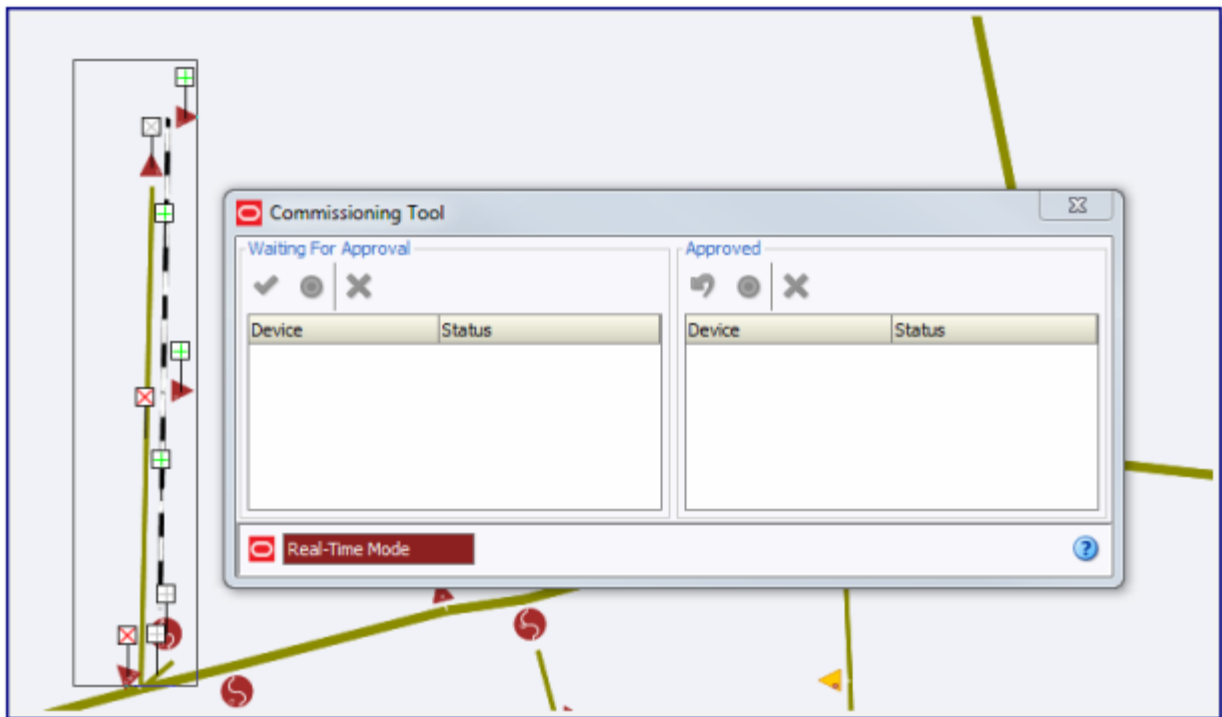
## Selecting Pending Devices

When you select a device in the Viewer that is pending construction or decommission, the device is listed in one of the panels in the Commissioning Tool.







With Transformer T10540 selected in the Viewer, the Commissioning Tool's Approved pane is populated with the Decommissioned device.

To select multiple objects, shift-click and drag until the selection box surrounds the objects.



**Note:** use the **Show Pending Devices** option in the Hide/Display dialog to display or hide pending devices.

The Viewer displays the following commissioning-related conditions:

- Unapproved pending construction (green): 
- Approved pending construction (gray): 
- Unapproved pending decommission (red): 
- Approved pending decommission (gray): 

## Using the Commissioning Tool with Web Switching Management

The Commissioning Tool will generate switching steps for each commissioning/decommissioning device action when Web Switching Management is licensed. Commissioning/decommissioning actions will always be recorded in Real-Time mode. The actions will either go into the Miscellaneous Log or a switching sheet recording Real-Time operations.

Non-complete Commissioning and Decommissioning steps can be executed over and over again in Study mode within the switching sheet they were recorded into. In Real Time, the steps can only be Instructed and Completed one time which will initiate the action against the Real Time model. Completing the step in study mode will only cause the action to be completed in the user's study session.

An error will be generated when completing a commissioning/decommissioning step where the device has not been setup for commissioning or decommissioning. This error will cause the step to not complete and will halt step execution.

A warning scenario will be generated when completing a commissioning/decommissioning step where the resulting action has already been applied to the device in question. The user will have the option of ignoring the warning, which will cause step execution to continue. If the warning is not ignored, then step execution will be stopped.

## Using the Web Workspace Control Tool

The Control Tool, which is a component of Oracle Utilities Network Management System Web Workspace, lets you perform actions on devices. It is typically brought up from the Viewer, although it can also be brought up from an event in the Work Agenda window. The actions you can perform on devices include tagging a device, placing a note on a device, re-predicting an outage upstream or downstream from a device, and opening and closing a device.

Control Tool topics include:


- **Understanding the Control Tool**
- **Operating Devices**
- **Tagging Devices**
- **Placing Grounds**
- **Disabling ATOs**
- **Highlighting Events in the Work Agenda**
- **Repredicting Upstream/Downstream**
- **Viewing Associated Customers**
- **Using Notes**
- **Viewing Device Attribute Information**
- **Toggling Call Display**
- **Viewing Customers**
- **Placing Jumpers**
- **Creating Momentary Outages**
- **Using the Look Ahead Window**
- **Associating Documents to Devices**
- **Associating Damage Assessments to a Device**
- **Completing and Instructing Actions**

For related topics, see also:

- **Using SCADA Control Tool Features** on page 8-6
- **Web Switching Management** on page 9-1
- **Working with Safety Documents** on page 9-63

## Understanding the Control Tool

The Control Tool lets you perform device operations based on the current status of the device. For example, if a device is already open, you can close it. If the device is closed, you can open it. You can operate all or some of the phases of a device (if the device is a multi-phase device).

You can access the Control Tool from the Viewer by clicking the **Control Tool** button (  ) on the Viewer toolbar. This puts you in Control Tool mode. Select a device by clicking on the device symbol (with the left mouse button) in the Viewer. If you click on the drawing area of the Viewer without selecting a device, the system selects the nearest device. You may also access the Control Tool from the Viewer by simply double-clicking on a device.

The name of the device is displayed at the top of the Control Tool. On the left side of the screen are a set of buttons for the options you can perform. The options that appear differ depending on

the type of device that the Control Tool was opened from (cable/conductor vs. actual device such as a transformer, fuse, etc.).

## Control Tool Actions

Control Tool operations and functions are performed by clicking the buttons displayed on the Control Tool. The following table describes common Control Tool buttons and the actions they perform.

Option	Description
Operate...	<p>Allows you to perform device operations; options available depend on the device and device state:</p> <ul style="list-style-type: none"> <li>• Open</li> <li>• Close</li> <li>• Instruct Open</li> <li>• Instruct Close</li> <li>• Open and Tag</li> <li>• Instruct Open and Tag</li> <li>• Remove Tag and Close Device</li> <li>• Instruct Remove Tag and Close</li> <li>• Undo Open.</li> <li>• Secondary Device Actions: <ul style="list-style-type: none"> <li>• Open Backfeed</li> <li>• Instruct Open Backfeed</li> <li>• Close Backfeed</li> <li>• Instruct Close Backfeed</li> <li>• Open Main &amp; Close Backfeed</li> <li>• Instruct Open Main &amp; Close Backfeed</li> <li>• Open Backfeed &amp; Close Main</li> <li>• Instruct Open Backfeed &amp; Close Main</li> </ul> </li> </ul>
Phase Wire Down	Inserts a wire down condition into the model.
Put Wire Up	Removes wire down condition from the model
Tag...	Allows you to Place Tag, Instruct Place Tag, Remove Tag, and Instruct Remove Tag.
Ground...	Allows you to Place Ground, Instruct Place Ground, Remove Ground, and Instruct Remove Ground.
Highlight Event	Displays the event in the Work Agenda. You must have the correct view of the Work Agenda window open in order to see the highlighted event ( <i>e.g.</i> , the In Progress list).

Option	Description
Repredict Upstream	Allows you to manually repredict the outage to the next predictable upstream device.
Repredict Downstream	Allows you to manually repredict the outage to the next predictable downstream device.
Repredict to Here	Allows you to manually repredict downstream outages to the selected device.
View Documents...	Allows you to view documents associated with devices.
Note...	Allows you to place notes on devices.
Attributes...	Displays the Device Attributes window, which lists information about the selected device's properties.
Damage Assessment...	Opens the Damage Assessments window, which displays a list of damage assessments associated with the device selected in the Viewer and allows you to add new damage assessments. See <b>Damage Assessment Window</b> on page 2-18.
Toggle Call Display	Toggles the call display on or off. When enabled, a symbol is displayed in the Viewer window for any transformers that have calls associated with the event. This option is only available on Control Tools that are opened from a predictable outage device, such as a switch or fuse, which has an open associated event.
Customer List...	Displays the customers downstream from a device.
AMI Customer List...	Displays the meters downstream from a device.
Switching Plan(s)...	Allows you to open a switching plan associated with the device. If multiple plans are associated with the device, the Device to Sheet Operation List displays a list of switching sheets and associated operations. Each operation represents a step in the switching sheet. Select a sheet operation and click <b>Open</b> . See <b>Web Switching Management</b> on page 9-1 for more information on using Web Switching Management.
Safety Document(s)...	Allows you to open safety documents associated with the device. If multiple documents are associated with the device, select a document from the Device to Safety Document list and click <b>Open</b> . See <b>Working with Safety Documents</b> on page 9-63 for more information on working with safety documents.
SCADA Summary...	Opens the SCADA Summary window. See <b>SCADA Summary</b> on page 1-83 for more information.

Option	Description
Operate Phases	Allows you to operate all or specific phases of a device by toggling All or any combination of A, B, and C phases. Any phases not applicable to the device are disabled ( <i>e.g.</i> , the Control Tool for an A phase transformer will have B and C disabled). This option is disabled if the selected device is 'gang-operated.'
Date and Time	Allows you to record the date and time an operation was performed. The field defaults to the current date and time, but you can adjust the date using the up and down arrow buttons next to the field. The date and time of the operation displays in the Event Recorder window. Note that this will also affect reported outage times.
Help	Displays Control Tool help.
Exit	Closes the Control Tool.

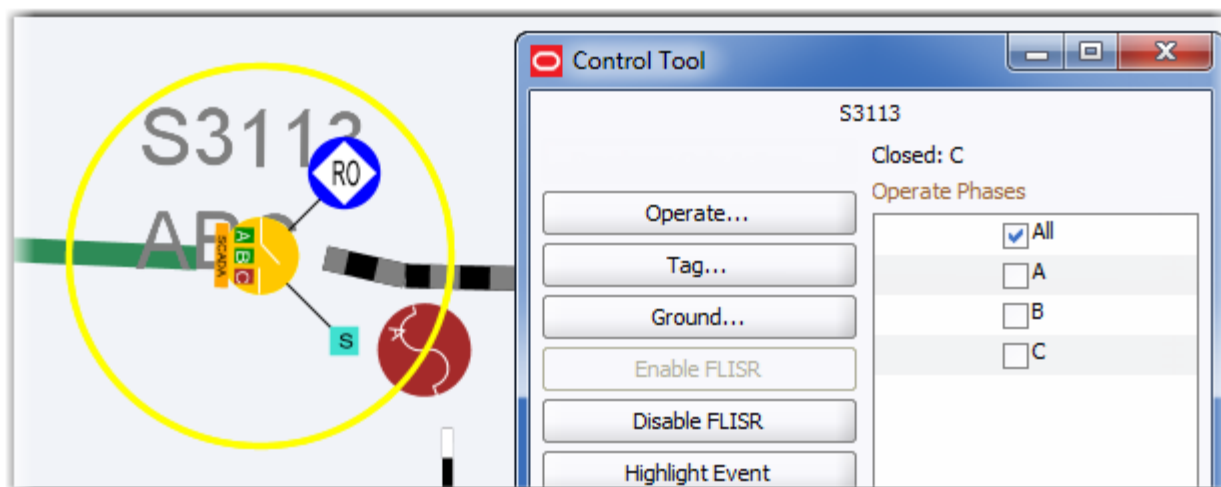
## Operating Devices

You can open or close a device in the Viewer to reflect the current state of the device in the field. The Control Tool's available device operation options depend on the status of the device. For example, a Control Tool opened from an open device will only allow you to close the device. In real-time mode, you must have authority over the control zone where the device is located in order to operate the device.

If a device has multiple phases and you only want to open or close one of the phases, you can select which phase you want to operate using the toggle buttons in the Operate Phases section on the right side of the Control Tool.

**Note:** Phase selection is disabled when the selected device is 'gang-operated'.

The Control Tool's Operate Phases pane displays the phases available for the selected device. A label above the Operate Phases section indicates the phases that are currently closed. For example, in the image below, a three phase switch is shown in the Viewer with the A and B phases abnormally open; the Control Tool shows that the C phase is closed and its Operate Phases pane lists all three phases available on the device.






The Control Tool opens with the **All** phases check box selected whether the device is single phase, two phase, or three phase. You can select one or more phases to perform actions (note that you cannot perform open or close operations on All phases of a device that has different phases in different states).

## Opening a Device

To open one or more phases on a device:

1. Do one of the following:
  - With the Viewer in Control Tool mode () , click the closed device that you want to open.
  - If the Viewer is not in Control Tool mode, double-click the closed device that you want to open.

The Control Tool opens.


2. Select the phase or phases that you want to open by placing a check mark in the check box alongside the phase. If you wish to open all closed phases, you may leave ALL selected (which is the default).
3. Click **Open**. The selected phase(s) for the device open. If no phase is selected, an error message displays.

## Undoing the Open Operation

You can undo an Open operation, which is different than closing a device. With the Undo Open operation, any RDO that would have been restored will revert back to a predicted outage. As a result, no restore time is set for the associated job and the job remains active.

## Closing a Device

To close one or more phases on a device:

1. Do one of the following:
  - With the Viewer in Control Tool mode () , click the open device that you want to close.
  - If the Viewer is not in Control Tool mode, double-click the open device that you want to close.

The Control Tool opens.

2. Select the phase or phases you want to close by placing a check mark in the check box alongside the phase. If you wish to close all open phases, you may leave ALL selected (which is the default).
3. Click **Close**. The selected phase(s) for the device close.

## Instructed Actions

The Instructed Actions panel provides a way of recording results of instructed actions from the Control Tool rather than through an Emergency Switching Sheet or the Miscellaneous Log. When an action is instructed, the panel's buttons are enabled so you can record the response.

To record instructed actions results:

1. Do one of the following:
  - In the Viewer, ensure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on the device to be operated.

- In the Viewer, double-click on the device to be operated.

The Control Tool opens.

2. Click the **Operate...** button.
3. Select an instruct operation, such as “Instruct Open.” The Instructed Actions pane will become sensitized.
4. At this point, the crew would be instructed to open the device and would report back whether:
  - they completed the action
  - they aborted the action
  - the action failed
5. Click the button corresponding to the result.

You may also click the **Show Sheet** button to open the associated Emergency Switching Sheet, if one has been created, or the Miscellaneous Log, if there is not an existing Emergency Switching Sheet.

**Note:** this example assumes a crew is in the field being instructed to perform certain operations. The sequence of events is designed to be illustrative of the Control Tool actions rather than a suggested workflow for field operations.

#### Related

- **Emergency Switching** on page 9-59
- **Using the Miscellaneous Log** on page 9-73

## Tagging Devices

You can tag devices in the Viewer window that are physically tagged in the field. Tags placed on devices in the system prevent users from performing open or close operations on the device. When you place a tag on a device, a tag symbol appears attached to that device in the Viewer. You can place multiple tags on a single device. When you do, the number of tags on the device appears in parentheses next to the tag in the Viewer. You must have authority over the control zone where the device is located in order to tag the device.

### Placing a Tag

To place a tag on a device:

1. Do one of the following:
  - In the Viewer, ensure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on the device that you want to tag.
  - In the Viewer, double-click on the device you want to tag.The Control Tool opens.
2. Click the **Place Tag** button. A tag symbol displays next to that device in the Viewer. If a tag symbol already existed (the device had at least one current tag), a number in parentheses next to the tag symbol will indicate the updated current number of tags.

### Removing a Tag

To remove a tag from a device:

1. Do one of the following:
  - In the Viewer, ensure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on the device that has the tag.

- In the Viewer, double-click on the device that has the tag.

The Control Tool opens.

2. Click the **Remove Tag** button. The Remove Tag dialog box opens, displaying a list of the tags on that device, including when the tag was placed and the user who placed it.
3. Select the row of the tag you want to remove and click the **Remove** button. The tag is removed. The number next to the tag symbol is decreased by one, unless there is now only one tag left, in which case the number is removed. If the last tag is removed, the tag symbol is removed from the Viewer.

## Placing Grounds

When you open a Control Tool from certain devices or conductors (*e.g.*, fuse or wire), the ground function is available. Grounding a device grounds all parts of the circuit connected to the grounding point. The Look Ahead window warns you if the grounding action will create a live, grounded circuit. The grounded circuit is highlighted in the Viewer and indicated by a grounding symbol at the selected device or midpoint of the selected conductor.

### Grounding a Device

To ground a device, complete these steps:

1. Open a Viewer window and load the map that contains the device you want to ground.
2. Double-click on the device. The Control Tool opens.
3. Click on the **Ground...** button and select **Place Ground** from the drop-down menu. A Select Secondary Object dialog box appears.
4. Click on the conductor attached to the device on the side you want to ground and the name of that conductor will appear in the dialog box.
5. Click **OK** to proceed with the ground.

If you are grounding a live conductor, a warning box opens indicating that you are about to “ground a live section.” Click the **OK** to Operate Device button to proceed with the grounding action (a grounding symbol appears in the Viewer on the device), or click the **Cancel** button to abort the grounding action.

### Removing a Ground from a Device

You can only remove a ground from the device or conductor on which the grounding was applied. To remove a ground from a device, complete these steps:

1. Open a Viewer window and load the map that contains the grounded device.
2. Double-click on the device. The Control Tool opens.
3. Click on the **Ground...** button and select **Remove Ground** from the drop-down menu. A Select Secondary Object dialog box appears.
4. Click on the conductor attached to the device on the side with the ground you want to remove. The alias of that conductor appears in the dialog box.
5. Click **OK**. The grounding symbol is removed from the Viewer.

## Disabling ATOs

When you open a Control Tool from a Primary or Secondary ATO switch, the ATO Disable function is available. Disabling either ATO switch prevents the system from automatically throwing-over or auto-returning the pair of switches.

### Placing a DISABLED Condition

To place a tag on a device:

1. Do one of the following:
  - In the Viewer, ensure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on the ATO switch that you want to disable
  - In the Viewer, double-click on the ATO switch you want to disable.

The Control Tool opens.

2. Click on the **Disable ATO** button.
3. A DISABLED condition will appear on the ATO switch.

The ATO switches can now be operated manually, and energization can change, and the system will not automatically operate either ATO switch.

### Removing a DISABLED Condition

To re-enable the ATO switch:

1. Do one of the following:
  - In the Viewer, ensure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on the ATO switch that has the DISABLED condition.
  - In the Viewer, double-click on the ATO switch that has the DISABLED condition.

The Control Tool opens.

- Click on the **Enable ATO** button. The DISABLED condition will disappear from the ATO switch.

Once both ATO switches are enabled, the system will once again set the ATO switches to their correct positions, based on the energization.

## Highlighting Events in the Work Agenda

If an event is associated with a selected device, you can find it in the Work Agenda window using the **Highlight Event** button on the Control Tool. You must have the correct view of the Work Agenda window open in order to see the highlighted event (*e.g.*, the In Progress list).

**Note:** If there are multiple events associated with a device, only the first one found will be highlighted.

## Repredicting Upstream/Downstream

You can force the system to manually repredict a predicted outage either upstream or downstream from the current system predicted device. This is typically done when a crew finds that the problem is not at the predicted device.

- If the device is energized, the problem is actually one or more downstream outages.
- If the device is de-energized, the problem will actually be upstream.

Clicking the **Repredict Upstream** or **Repredict Downstream** button manually repredicts the outage to the next predictable upstream or downstream device. When repredicting downstream, the system distributes the event to one or more devices. Once a predicted outage is manually

repredicted upstream or downstream, the system will treat the repredicted outages as non-grouping and no longer automatically repredict them.

For example, a crew finds that a predicted service outage (indicated by the “PSO” symbol) at a transformer is not actually where the trouble is located. Using the Control Tool, you can repredict the outage upstream to the switch. When you repredict the outage, the switch displays a “PDO” (predicted device outage) symbol. The original predicted service outage displayed in one of Work Agenda’s Trouble Events list windows changes to a predicted device outage located at the switch.

## Viewing Documents Associated with a Device

To view documents associated with a device, complete these steps:

1. Open a Viewer window. Locate a device that has an associated document you wish to view. (Devices with associated documents have a “**DOC**” condition symbol.)
2. Double-click on the device to bring up the Control Tool.
3. Select the **View Documents...** option from the Control Tool.
  - The Manage Documents window appears, which lists any associated documents for the selected device.
  - Select the document and click the **View Document** button to open the document for viewing.
  - Click the **Quit** button to exit the Manage Documents window.

For instructions on associating documents to devices, see **Violations Changes/Before/After Tab** on page 1-74. Note that this function is available only to administrative users.

## Using Notes

The Control Tool allows you to place notes on devices. Note text is displayed in the **Displaying Device Details** balloon dialog in the Viewer or by opening the note by clicking the **Control Tool’s Note ...** button, which will open the **Condition Data** dialog. All notes for the selected device are listed in the **Conditions** field. You can add or edit note text in the **Condition Text** field.

The Condition Data dialog displays the following fields and buttons:

- The **Condition Type** field displays the condition type of note.
- The **Object** field displays the object class of the device.
- The **Object Name** field displays the name or ID of the device.
- The **Conditions** field lists the notes that have been entered for the device.
- The **Condition Text** field displays the text of the selected note.
- The **New** button allows you to enter a new note for the device.
- The **Edit** button allows you to edit the text of the selected note.
- The **Delete** button deletes the selected note.
- The **Cancel** button closes the Condition Data dialog.

## Creating a Note

You can create one or more notes for a device using the Control Tool. Once you save a note, a note symbol displays in the Viewer next to the device. If you create multiple notes for a device, the number of notes is displayed in parentheses next to the note symbol.

To enter a note, complete these steps:

1. In the Viewer, open the Control Tool for the device.
2. On the Control Tool, click the **Note...** button. The **Condition Data** dialog opens.
3. Click the **New** button. The Condition Text field changes to an Add/Edit Text field.
4. Click in the Add/Edit Text field and enter the note text.
5. Click **Save**. The note is saved. The note text is displayed in the Conditions field. A note symbol appears in the Viewer next to the device. If a note already existed, a number appears in parentheses next to the note symbol with the current number of notes.

## Editing a Note

To edit an existing note from the Control Tool, complete these steps:

1. In the Viewer, open the Control Tool for the device.
2. Click the **Note...** button. The Condition Data dialog opens with existing notes listed in the Conditions field.
3. Select the note that you want to edit. The note text will display in the Condition Text field.
4. Click the **Edit** button. The Condition Text field changes to an Add/Edit Text field.
5. Click in the Add/Edit Text field and edit the note text as needed.
6. Click **Save**. The note is saved.

## Deleting a Note

You can delete a note once it no longer applies to the device or the event.

To delete a note, complete these steps:

1. In the Viewer, open the Control Tool for the device.
2. Click the **Note...** button. The Condition Data dialog opens with existing notes listed in the Conditions field.
3. Select the note that you want to delete.
4. Click the **Delete** button. The note is deleted from the Condition Data dialog. If it was the only note for the device, then the note symbol disappears from the Viewer. Otherwise, the note flag remains, but the number of notes (shown in parentheses next to the note) is decremented by one if there were three or more notes or removed if there were two notes.

## Viewing Device Attribute Information

You can access attribute information related to a device using the Control Tool. Device attributes include physical and reference information about a device, such as location and rating. To view device attributes, complete these steps:

1. In the Viewer, make sure that the **Control Tool** button is selected, indicating that you are in Control Tool mode. Click on a device in the Viewer.

Or,

Double-click on a device in the Viewer.

The Control Tool opens.

2. Click the **Attributes...** button on the Control Tool. The Device Information window opens.

**Note:** The information in the Device Information is view-only.

## Toggling Call Display

You can view the calls associated with an event in the Viewer by clicking the **Toggle Call Display** button. A symbol appears attached to any transformers serving customers that have calls associated with the event. If there were multiple calls with the same “clues” then a number will appear in parentheses next to the call symbol. To hide the symbols, open the Control Tool from the device and click the **Toggle Call Display** button again.

## Viewing Associated Customers

To view the customers on and downstream from a device, click the **Customer List...** button on the Control Tool. The Customers view of the Trouble Info window opens, listing all customers on and downstream from the device. See **Using the Trouble Info Window** on page 2-42 for more information.

**Note:** You cannot toggle over to the Calls view when you open the Trouble Info window from this Customer List option.

## Viewing Customers

To view the meters downstream from a device, click the **Customer List...** button on the Control Tool. The Customers view of the Trouble Info window opens, listing all meters downstream from the device. The information displayed includes the device, phases, customer name, address, phone number and account number of the customer, as well as recent meter ping information. From this page, you can initiate a ping request, as well as monitor previous ping results. See **Using the Trouble Info Window** on page 2-42 for more information.

## Placing Jumpers

In addition to creating an open point, you can insert a jumper on an overhead conductor or between overhead conductors. You can also place emergency cables between underground devices. The jumper is an active part of the model and fully operable. You can open and close a jumper as well as place tags and notes on the jumper.

The following table describes the different jumper types.

Jumper Type	Description
In-line Jumper	In-line jumpers are placed in line. The position for the jumper is set to “closed” to maintain a continuous conductor. A closed jumper symbol displays at the midpoint of the selected conductor.
P-P Jumper / Emergency Cable	Point-to-point jumpers are placed between a selected conductor and the same phase on any other conductor. A dialog box allows you to specify the second conductor. You can select the conductor in the Viewer. A point-to-point jumper symbol displays at the midpoints of the selected conductors. The default state for the inserted jumper is “open.”
P-P Cross Phase	Point-to-point cross phase jumpers are placed between different phases on two different conductors. The Cross Phase Selection dialog box allows you to select a live phase and the phase to pick up. The Select Secondary dialog box allows you to specify the second conductor. You can select the conductor in the Viewer. A point-to-point jumper symbol displays, connecting the midpoints of the selected conductors. The default state for the inserted jumper is “open.”
Tap Generator	Tap Generators are used to add an energization point to the model. A Selection Required dialog box allows you to specify the tap location by clicking on the location in the Viewer.

### Inserting a Jumper

After the crew informs you what type of jumper they will insert, you can make the change in the system. To insert a jumper, complete these steps:

1. Open a Viewer and load the map that contains the conductor where you want to place the jumper.
2. Double-click on the conductor. The **Control Tool** opens.
3. Select the appropriate button for the type of jumper you want to insert.
  - If you are placing a point-to-point jumper, point-to-point cross phase, or emergency cable, the Select Secondary dialog box opens. Continue with the next step.
  - If you are placing an in-line jumper, skip to step 5.
4. Select another conductor (in the Viewer), and then click **OK**.
  - If you are placing a point-to-point cross phase, the Cross Phase Selection dialog box opens. Select a phase for each device, and click **OK**.

A dialog will appear notifying you that a model edit is in progress; the dialog will disappear when the model build is completed.

**Note:** Click **OK** to dismiss the dialog or move it to the side while performing other operations. The Viewer will then refresh to display the jumper.



## Operating a Jumper

Like devices, you can open and close (Disconnect and Connect) jumpers. To open or close a jumper, complete these steps:

1. Open a Viewer and load the map that contains the jumper you want to operate.
2. Double-click on the jumper. The Control Tool opens.
3. Select the desired phases from the Phases panel, then click the operation you want to perform, either **Disconnect Jumper** or **Connect Jumper**.

## Removing a Jumper

Once a jumper has been removed in the field, you can remove the jumper from the system. This removes the jumper and fully restores the conductor. To remove a jumper, complete these steps:

1. Open a Viewer and load the map that contains the jumper you want to remove.
2. Double-click on the jumper. The Control Tool opens.
3. Click the **Remove Jumper** button on the Control Tool. Wait a moment as the system updates the model.
4. Click **Yes** in the Map Load Confirmation dialog box if you want to reload the map. The Viewer displays the jumper.

## Placing/Performing a Tap Edit

To perform a tap edit:

1. Open a Viewer.
2. Load the map containing the conductor where you want to place the jumper.
3. Double-click on the conductor. The Control Tool opens.
4. Select the **Tap Generator** button.
5. Select a location in the Selection Required dialog box and click **OK**. The model edit is performed and a new energization point appears in the map at the selected spot.

## Creating Momentary Outages

You can create a momentary outage by simulating a momentary interruption in the system. Momentary interruptions occur when a recloser operates and does not lock out. The Create Momentary... button is only enabled on Control Tools opened from reclosing devices. To create a momentary outage, complete these steps:

1. Open a Viewer and load the map that contains the device that you want to create the momentary outage for.
2. Double-click on the device. The Control Tool opens.
3. Adjust the date and time if necessary.
4. Click the **Create Momentary...** button. A dialog box opens.
5. Enter the number of momentaries. Values between 1 and 100 enable the **OK** button.
6. Click **OK**. The momentary outage displays in the Work Agenda window with a status of "M-CMP." In addition, two alarms display in the System Alarms list, one for opening and one for closing.

## Using Aggregate Device Actions

The Control Tool's aggregate device actions operate multiple devices with a single action. These actions are only available when the devices have been modeled for aggregate actions. When modeled, the Control Tool's Operate... function has a Secondary Device Actions sub-menu with the aggregate actions.

**Note:** The actions can still be performed separately when aggregate actions are possible.

## Using the Look Ahead Window

The Look Ahead window provides information concerning the results of performing a requested device operation. The Look Ahead window uses system status and topology tracing to “look ahead” of the requested operation and determine its consequences.

The Look Ahead window displays whenever a switching operation is initiated from the Control Tool in energized or de-energized portions of the distribution system. After determining the consequences, the Look Ahead window either displays the appropriate dialog box or gathers additional data for display. You can use the information displayed in the Look Ahead window to decide whether to continue with the operation.

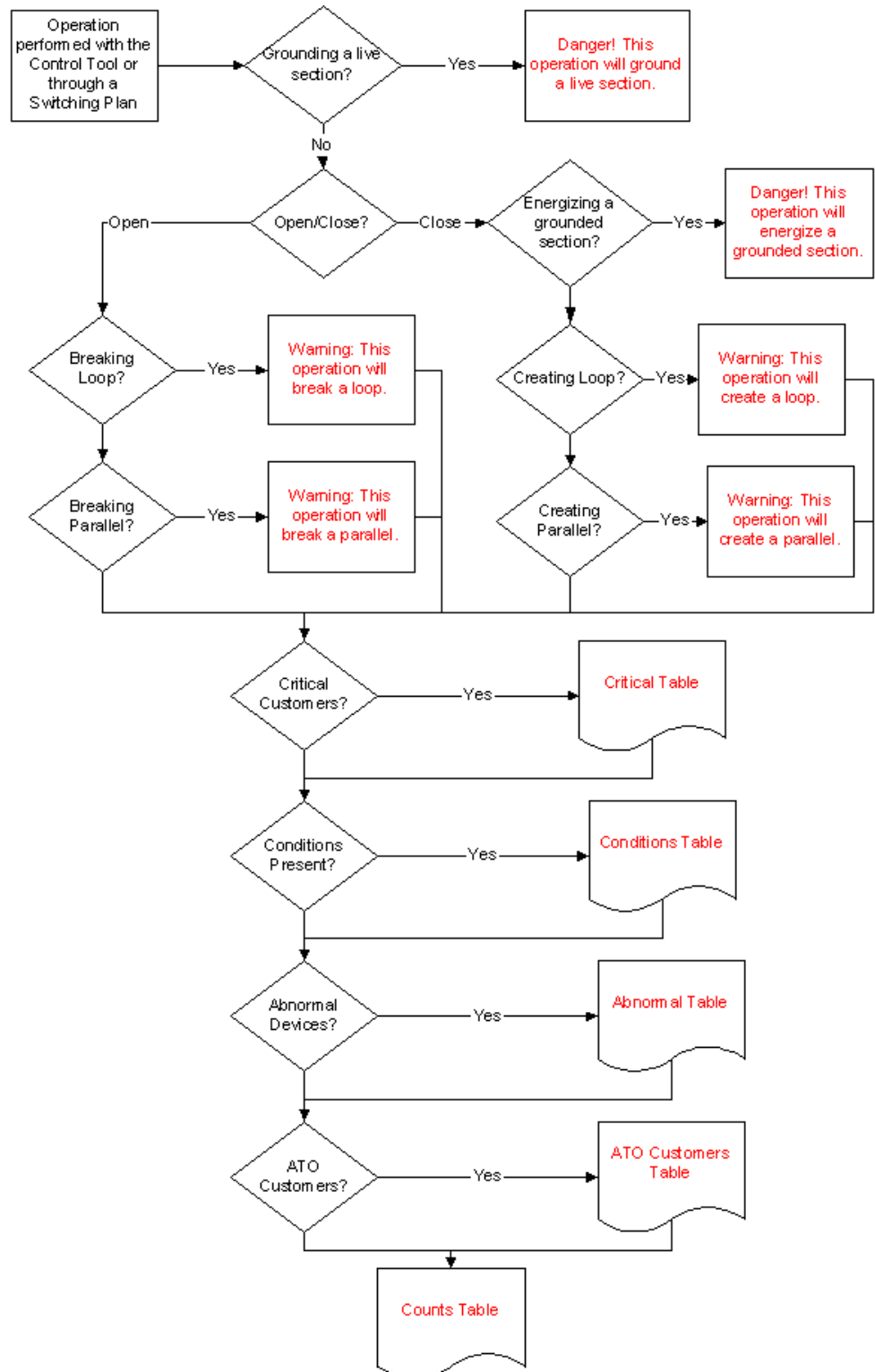
This section includes the following topics:

- **Understanding the Look-Ahead Process**
- **Drop Count Tab**
- **Pickup Count Tab**
- **ATO Customers Tab**
- **View Conditions Tab**
- **View Abnormal Tab**
- **View Critical Tab**
- **Violations Changes/Before/After Tab**

## Understanding the Look-Ahead Process

The Look Ahead window uses status and topology tracing to “look ahead” of the requested operation and determine its consequences. Based on this information, you can decide whether to continue with an operation.

The flow diagram below shows the basic logic of the Look Ahead window.



The Look Ahead window displays a warning if an operation will create or break loops or parallels. Counts, conditions, and abnormal device information are not available when dealing with loops and parallels.

The Look Ahead window displays whenever a switching operation is initiated from the Control Tool in energized, as well as de-energized, portions of the distribution system. If the operation will energize or de-energize the system, additional data is gathered and displayed in the Look Ahead window.

The information displayed depends on the results of performing the operation. A tab is enabled only if table information is available. You cannot open or close a device until you view any abnormal devices or conditions (see **View Abnormal Tab** on page 1-74).

**Note:** If you attempt to open a switch in a deenergized area, the system displays the Create Nested Outage dialog box before displaying the Look Ahead window. Do one of the following:

- Click **Yes** to create a nested outage.
- Click **No** to open the switch without creating a nested outage.
- Click **Cancel** to cancel the operation.

## The Look Ahead Window

The Look Ahead window contains tabs and tables that display event- and device-related information. The items on the Look Ahead window are described below:

- **Header and Power Flow Results**
- **Drop Count Tab**
- **Pickup Count Tab**
- **ATO Customers Tab**
- **View Conditions Tab**
- **View Abnormal Tab.**
- **View Critical Tab**
- **Violations Changes/Before/After Tab**

### Header and Power Flow Results

- The **Device** field displays the name of the device being operated.
- The **Phase(s) to Operate** field displays the phase(s) of the device being operated.
- The **Run Power Flow** button allows you to generate a Power Flow solution for the device. The Power Flow Results are displayed at the top of the Look Ahead Dialog. If any violations occurred during the run, the **Violations Changes/Before/After Tab** tab is enabled and the violations are listed.

For example, if you open a tie switch and then click the **Run Power Flow** button, the Power Flow Results panel displays the Breaking Current amps, the voltage difference, and the number of violations.

See **Chapter 10, Power Flow, Suggested Switching, and Volt/VAr Optimization** for more information about Power Flow. This button is only available if Power Flow is licensed for your system.

### Drop Count Tab

The Drop Count tab displays the number of customers affected by the device operation. This tab provides information for Total Customers and total Critical Customers, with sub counts for three types of critical customers.

- The **Drop** columns display the drop information for the device. Information is displayed as counts dropped downstream of the device.
- The **Feeder** columns display the total counts for the feeder on which the device to operate is located.
- The first set of Drop and Feed columns shows data for the total counts.
- The following three sets (A, B, and C) show data for each individual phase.
- The last set shows counts for 3 phase customers. The counts for the individual phases (A, B, C) and 3-phase add up to the counts in the first or total columns (*i.e.*,  $A+B+C+3=Total$ ).

### Pickup Count Tab

The Pickup Count tab displays the number of customers affected by the device operation. This tab provides information for Total Customers and total Critical Customers, with sub counts for three types of critical customers.

- The first set of two columns shows data for the total counts. The following three sets of two columns show data for each individual phase (A, B, and C), with the last set showing counts for 3 phase customers. The counts for the individual phases (A, B, C) and 3-phase will add up to the counts in the “total” columns (*i.e.*,  $A+B+C+3=Total$ ).
- The **Pickup** columns display the pickup information for the device. Information is displayed as counts picked up downstream of the device.
- The **Feeder** columns display the total counts for the feeder on which the device to operate is located.

### ATO Customers Tab

The ATO Customers tab displays the number of customers affected by automatic ATO operations as a result of the device operation. These customers are not listed in the Counts table.

On loss of the primary feed:

- The ATO Customers page lists customers downstream from a pair of enabled ATO switches with a live secondary feed, because they will experience a momentary outage.
- The ATO Customers page does not list customers downstream from a pair of ATOs if either the primary or secondary switch is disabled. These customers appear on the Counts table, because they will experience a sustained outage.
- The ATO Customers page does not list customers downstream from a pair of ATOs if the secondary feed is already lost. These customers appear on the Counts table, because they will experience a sustained outage.

On restoration of the primary feed:

- The ATO Customers page lists de-energized customers who will be auto-returned if the secondary feed is already lost.
- The ATO Customers page lists currently energized customers who will be auto-returned if the ATO is configured as a “break before make” on auto-return.
- The ATO Customers page does not list currently energized customers who will be auto-returned if the ATO is configured as a “make before break” on auto-return.

Similarly to the Counts table, the ATO Customers table provides information for total Critical Customers with sub counts for three types of critical customers, Interrupting Current (phase), and Total Customers.

The first column shows data for the total counts. The following three columns show data for each individual phase (A, B, and C), with the last set showing counts for 3 phase customers. The counts for the individual phases (A, B, C) and 3-phase will add up to the counts in the “total” columns (*i.e.*,  $A+B+C+3=Total$ ).

The rows displayed in the counts table include Crit Customers, EMR Customers, MED Customers, KEY Customers, Interrupting Current and total customers. Click on the **View ATO Custs** button to access ATO Customer information from any of the other views.

### View Conditions Tab

The View Conditions tab shows any special conditions currently active on the circuit, including crew locations, tags, notes, etc. If conditions are present, you must view the conditions table to complete the operation. Click on the View Conditions tab to access condition information.

The Conditions table displays the following columns:

- The **Condition** column displays the type of condition that is present on the feeder such as a truck\_location (crew), tag, note, etc.
- The **Device** column displays the name of the device on which the condition is located.
- The **Location** column indicates whether the condition is upstream or downstream of the current device.
- The **User Name** column displays the user name of the user that created the condition.
- The **Date/Time** column displays the date and time that the condition was created.

### View Abnormal Tab

The View Abnormal tab displays data about abnormal devices on the same feeder as the device to operate. An “abnormal device” is any device that is not in its nominal state (*e.g.*, an open device that is normally closed).

The Alarms and Devices table displays the following columns:

- The **Device** column displays the name of the device that is in an abnormal state.
- The **Nominal Status** column displays the normal status of the device.
- The **Current Status** column displays the current status of the device.

### View Critical Tab

The View Critical tab shows customers classified as critical (*e.g.*, emergency, medical, key) that would be impacted by the proposed device operation.

The Critical Customers table displays the following columns:



- The **Name** column displays the critical customer’s name.
- The **Address** column displays the critical customer’s address.
- The **Phone** column displays the critical customer’s telephone number.

### Violations Changes/Before/After Tab

The Violations tab displays a list of all violations reported by Power Flow the last time Power Flow was run on this device. If Power Flow has not been run or no violations were encountered, this tab is grayed.

Click the **Run Power Flow** button on the Look Ahead Dialog to run Power Flow. The Power Flow results are displayed at the top of the dialog. If violations are encountered during the run, the Violations Changes tab is enabled and the violations are listed in the violations table.

## Actions

- The Violations tab provides a Viewer Target (  ) button to focus the Viewer on the device in a selected row.
- The Violations table may be printed by clicking the Print (  ) button.

The violations table displays the following columns:

- **Device** – The device's name
- **Violation** – The violation or warning name. See **Data Source and Data Quality** on page 11-20 for range of values and colors for this column.
- **Phase** – The phase that the violation is on
- **Value Before** – The value before the action
- **% Before** – the ratio of the value before to the limit
- **Value After** – The value after the action
- **% After** – the ratio of the value after the action to the limit
- **Limit** – The violation/warning limit
- **Status** – The result of the action on the violation.
  - **Removed** – the violation has been removed by the action.
  - **Added** – a new violation will be added due to the action.
  - **Better** – changed from violation to warning after the action or the percent decreased (increased for under voltage violations/warnings) more than the threshold.
  - **Worse** – changed from warning to violation after the action or which percent increased (decreased for under voltage violations/warnings) more than the threshold.
  - **Same** – violations that exist in both lists and have values that did not change or the change was less than the threshold.

Three options menus enable filtering of the table data:

- Violations Only, Warnings Only, or Violations and Warnings
- Changes, After, or Before:
  - Changes: only shows changed violations resulting from the action
  - Before: shows the violations before the action
  - After: shows the violations after the action

**Note:** the Violations tab label changes based on the Changes/Before/After choice.
- Violation Types: Conductor, Power Transformer, Distribution Transformer, Switch, Voltage, Backfeed, and Feeder Capacity. Each violation type displays the violation and warning count in parenthesis when you click the option menu.

Each violation change has a specific background and font color-code:

- Added - red background, white foreground
- Worse - orange background, black foreground
- Better - yellow background, black foreground
- Removed - green background, black foreground

See **Chapter 10, Power Flow, Suggested Switching, and Volt/VAr Optimization** for more information about Power Flow.

### Buttons

- The **Open** button opens the device. If an “open” operation is being performed on a closed device, the Open button is enabled. If special conditions exist, then you must view the View Conditions tab before the Open button becomes enabled. Likewise, if abnormal device statuses exist, then you must view the View Abnormal tab before the Open button becomes enabled.
- The **Close** button closes the device. If a “close” operation is being performed on an open device, the Close button is enabled. If special conditions exist, then you must view the View Conditions tab before the Close button becomes enabled. Likewise, if abnormal device statuses exist, then you must view the View Abnormal tab before the Close button becomes enabled.
- The **Help...** button opens the online help content for Look Ahead.
- The **Cancel** button cancels the device operation and closes the Look Ahead window.

## Associating Documents to Devices

The Manage Documents window allows you to associate devices in the electrical topology model with various documents, as well as to view those associated documents.

**Note:** This feature is available only to administrative users. Non-administrative users can only view associated documents. See **Viewing Associated Documents** on page 1-78 for details.

This section includes the following topics:

- **Using the Manage Documents Window**
- **Associating a Document with a Device**
- **Removing a Document Association**
- **Viewing Associated Documents**

### Using the Manage Documents Window

To open this window, select **Manage Documents...** from the Web Workspace Tools menu.

The Manage Documents window displays the following fields and buttons:

- The **Selected Device** field lists the device selected in the Viewer.
- The **Manage Documents** field lists any documents associated to the device.
  - The **Unassociate** button allows you to remove the association between the selected device and a document selected in the Manage Documents field.
  - The **View Document** button allows you to view the selected document.
- The **Available Documents** field lists the contents of the \$CES\_DRAWINGS directory. Use the blank text field to filter the Available Documents list. (Type all or part of the document you are looking for. The list is dynamically updated to display document names that include the text you enter.)
- The **Associated Devices** field lists which devices have an association with the currently selected item in the Available Documents list.
- The **Associate** button allows you to associate the currently selected item in the Available Documents list with the Selected Device.



- The **View Document** button allows you to view the currently selected item in the Available Documents list.
- The **Exit** button closes the Manage Documents window.

## Associating a Document with a Device

**Note:** This feature is available only to administrative users. Non-administrative users can only view associated documents. See **Viewing Associated Documents** on page 1-78 for details.

To associate a document with a device, complete these steps:

1. Login to Web Workspace as an Administration user.
2. Select **Manage Documents...** from the Tools menu. The Manage Documents window opens. (See the previous section for field descriptions.)
3. Open a Viewer. Locate and select the device to associate to a document. The Manage Document window's Selected Device field populates with the selected device's name.
4. Select the item from the Available Documents list that you wish to associate with the selected device. The Associate and View Document buttons are now sensitized.
5. Click the **View Document** button to see the selected document. The selected document appears in a new window.
6. Click the **Associate** button to create the association between the selected document and selected device. The following occurs:
  - The field below the selected device populates with the name of the selected document, and the Associated Devices field populates with the name of the selected device.
  - In the Viewer, a document condition now appears on the selected device.
7. Click the **Exit** button to exit the Manage Documents window.

## Removing a Document Association

**Note:** This feature is available only to administrative users. Non-admin users can only view associated documents. See **Viewing Associated Documents** on page 1-78 for details.

To remove an association between a document and a device, complete these steps:

1. Login to Web Workspace as an Administration user.
2. Select **Manage Documents** from the Tools menu. The Manage Documents window opens.
3. Open a Viewer. Locate and select the device that you wish to disassociate from a document. The Manage Document window's Selected Device field populates with the name of the selected device and the Manage Documents pane lists all associated documents.
4. In the field below the Selected Device, select the document you wish to disassociate from the device. The Unassociate and View Document buttons are now sensitized.
5. Click the **View** button to see the selected document. The selected document appears in a new window.
6. Click the **Unassociate** button to remove the association between the selected document and selected device. The following occurs:
  - The selected document is removed from the field below the Selected Device.
  - In the Viewer, a document condition is removed from the selected device.
7. Click the **Exit** button to exit the Manage Documents window.

## Viewing Associated Documents

Administrations can view associated documents from the Manage Documents window while logged in to the Administration environment (see **Associating a Document with a Device** on page 1-77). Non-administrative users can view documents from the Control Tool. See **Viewing Documents Associated with a Device** on page 1-65.

## Associating Damage Assessments to a Device

You can enter damage assessment for a device. Damage assessment incidents are not included in counts for the event. The damage assessment trouble code has an associated clue symbol Damage Assessment clue symbol (letters 'DA' in a red circle), which will be displayed in Viewer at the damage location.

When you enter damage assessment information, you can select one or more crew types needed to repair the reported damage.

If multiple damage assessments exist for an event, the system will calculate the estimated repair time by adding together estimated repair times from each active damage assessment.

To enter damage assessment information for a device, complete the following steps:

1. Open the Web Workspace Viewer.
2. Select a device and open the Control Tool for the device.
3. Click the **Damage Assessment...** button. The Damage Assessments window opens for the selected device. If any damage assessment records exist for this device, they are displayed in the list.
4. Click the **New Damage Assessment** toolbar button. The Damage Assessment window opens.
5. Complete additional fields on this screen as needed. See **Damage Assessment Window** on page 2-18 for field descriptions.
6. Click the **Save** button on the toolbar.
7. Use the **Complete** toolbar button to complete the damage assessment. When a damage assessment record is completed, its status changes to inactive and its symbol is removed from Viewer.

## Completing and Instructing Actions

When you perform actions in the Control Tool while you are recording in Web Switching Management, the system automatically populates fields in the associated switching sheet as follows:

- The date field on the Control Tool, which defaults to the current date and time, is used to populate the Completed Date field in the associated switching sheet when an operation is completed in the Control Tool.
- If steps are instructed to a crew, this date is used to populate the Instructed Date field in the switching sheet.

The **Instructed Actions** area below the date field displays a list of actions that have been instructed on the selected device. The drop-down allows you to select an instructed action to complete.

The **Show Sheet...** button displays the sheet that contains the selected instructed action so you can execute the actions from Web Switching Management.

**Note:** This option is available only when Web Switching Management is licensed. This allows you to navigate to the switching sheet so you can perform

the step from there. If you are not using Web Switching Management, you can **Complete**, **Abort**, or **Fail** the selected instructed action from the Control Tool.

## Viewing Summaries

Web Workspace includes windows that provide summary information for data in the system:

- **Condition Summaries**
- **SCADA Summary**

Related Topics

- **Using the Feeder Load Summary**

## Condition Summaries

The Condition Summaries window lists all conditions, including notes, tags, pending decommisions or constructions, and FLISR actions.

This section includes the following topics:

- **Using the Condition Summaries Window**
- **Toolbar and Menu Options**
- **Using Condition Summaries Balloon Details**
- **Editing or Deleting Conditions**

### Using the Condition Summaries Window

To view the Condition Summaries window, select **Condition Summaries...** from the Actions menu in Web Workspace.

The Condition Summaries includes the following fields and buttons:

- The **Type** column contains the type of condition, such as Note, Tag, Pending Construction, Pending Decommission, FLISR Action, and Associated Document.
- **Condition #** is the system-assigned identifier of the condition.
- The **Date Created** column contains the date and time the condition was created.
- The **Substation** column contains the name of the substation that serves the device on which the condition is located.
- The **Feeder** column contains the name of the feeder that serves the device on which the condition is located.
- The **User** column contains the user name of the individual who placed the condition.
- The **Device** column contains the name of the device on which the condition is located.
- The **Phase** column contains the name of the phase associated with the condition.
- The **Condition Info** column contains the text of the note or other condition.




### Sorting and Filtering

The Conditions Summaries table supports common sorting and filtering functions. The predefined filters are based on the Condition Type; for example, the **Notes** filter selects all rows where the Type column has a value of *Note*.


See **Sorting and Filtering Data** on page 1-11 for additional information on using standard sorting and filtering features.

## Toolbar and Menu Options


### File Menu

Menu Option	Description	Toolbar Icon
Refresh	Refreshes the Condition Summaries window to display the most recent updates. If you edit a condition using the Edit button, you must refresh the summary to see your changes.	
Print Preview...	Displays the Print Preview window, from which you can view and print the summary.	
Delete Row...	Deletes the selected condition from the system. A confirmation dialog box prompts you to confirm before deleting. Once deleted, the condition disappears from both the Summary and the Viewer.	
Exit	Closes the Condition Summaries window.	--

### Sort Menu




Menu Option	Description	Toolbar Icon
Sort Dialog...	Displays the Sort dialog box. The Sort Dialog option on the Sort menu performs the same function.  See <b>Using the Sort Dialog Box</b> on page 1-11 for common sort functions.	
Condition #	Sorts the Conditions Summaries table by the Condition # column.	--
Device	Sorts the Conditions Summaries table by the Device column.	--
Date Created	Sorts the Conditions Summaries table by the Date Created column.	--

### Filter Menu

Menu Option	Description	Toolbar Icon
Filter Dialog...	Displays the Filter dialog box. The Filter Dialog option on the Filter menu performs the same function. See <b>Using the Filter Dialog</b> on page 1-12 for more information.	
All Conditions	Displays all conditions.	--
FLISR Actions	Displays only rows with Type equal to <i>FLISR Action</i> .	--
FLISR Disabled	Displays only rows with Type equal to <i>FLISR Disabled</i> .	--

Menu Option	Description	Toolbar Icon
Notes	Displays only rows with Type equal to <i>Note</i> .	--
Pending Construction	Displays only rows with Type equal to <i>Pending Construction</i> .	--
Pending Decommission	Displays only rows with Type equal to <i>Pending Decommission</i> .	--
Tags	Displays only rows with Type equal to <i>Tag</i> .	--

### Actions Menu

Menu Option	Description	Toolbar Icon
Edit...	Opens the Edit balloon dialog. See <b>Editing or Deleting Conditions</b> on page 1-82.	
Enable View Balloon	Enables or disables balloon details. When enabled, a callout-like balloon opens that provides information, such as notes or related device documents, for the selected row. See <b>Using Condition Summaries Balloon Details</b> on page 1-82 for more information.	
View...	Focuses the Viewer on the device associated with the condition.	


### Help Menu

Menu Option	Description	Toolbar Icon
Condition Summaries Help	Opens the online help system to the Condition Summaries help content.	--

## Using Condition Summaries Balloon Details

The Condition Summaries Balloon Details displays device information (e.g., note text and associated documents) for rows selected in the Condition Summaries list.

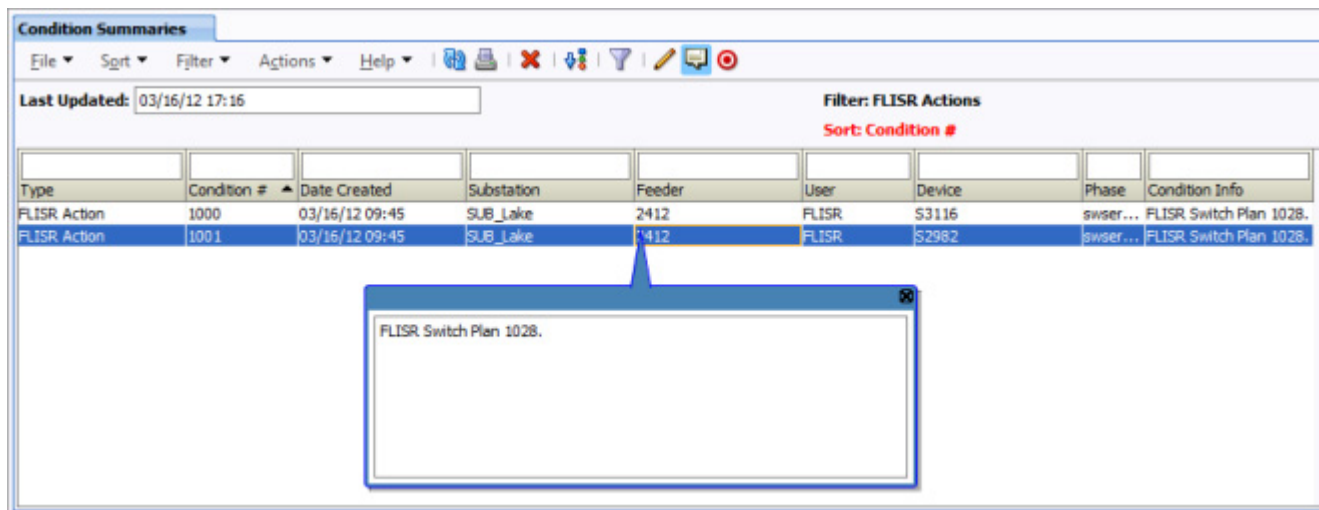
To enable Balloon Details:

1. Click **Balloon Details** (  ) on the Condition Summaries toolbar. When enabled, the toolbar behind the Balloon Details button will be highlighted.

To view condition details:


1. Select a row in the Condition Summaries table.

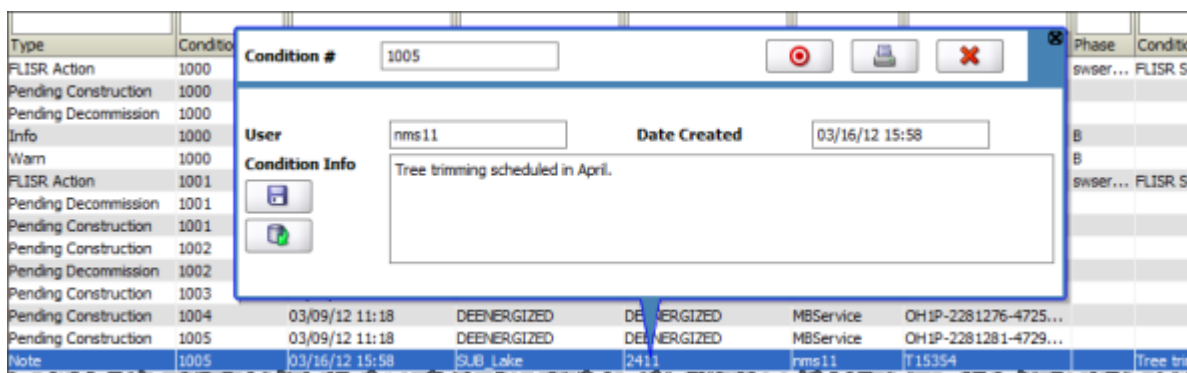
Balloon Details displays applicable information about the selected condition.





2. To close the balloon, click the close button (  ) in the balloon's top right corner.



## Editing or Deleting Conditions


To edit a selected condition, click the **Edit** button (  ). The Edit balloon opens. This dialog also appears if you double-click a condition when Balloon Details are turned off.



From this dialog, you can perform the following tasks:

- Edit the condition information as desired, then click the **Save** button .
- Click the **View** button (  ) to focus the Viewer on the device.
- Click the **Print** button (  ) to print the condition text.

- Click the **Revert** button () to revert to the last saved version of the condition text.
- Click the **Delete** button () to delete the condition.

**Note:** you can also delete a condition by selecting the condition row and clicking  from the Condition Summaries toolbar.

## SCADA Summary

SCADA functionality is provided as an extension to Oracle Utilities Network Management System. For an overview of SCADA extensions, see **SCADA Extensions** on page 8-1.

The SCADA Summary provides the current values and qualities of all mapped SCADA measurements in Oracle Utilities Network Management System. Each row of this summary represents one measurement. There may be multiple unique measurements on one SCADA device. SCADA information includes digital and analog measurements, along with the quality codes and any user comments for each measurement. You can use the summary to view measurement information, manually replace current SCADA values, and inhibit updates.

This section includes the following topics:

- **Using the SCADA Summary Window**
- **Toolbar and Menu Options**
- **Preventing Updates from SCADA**
- **Manual Entry and Override of SCADA Values**

### Using the SCADA Summary Window



To open the SCADA Summary, select **SCADA Summary...** from the Tools menu in Web Workspace.

The SCADA Summary displays the following fields and buttons:







- The **Feeder** column contains the name of the feeder reporting the SCADA measurements.
- The **Device** column contains the name of the device reporting the SCADA measurements.
- The **Value** column contains the last reported measurement value. The value can be status, digital, or analog. For status measurements, the values are displayed as a test pair, such as open/close, on/off, etc. Analog and digital values are shown as floating point and integer values.
- The **Quality** column contains the Quality codes for the measurement that indicates the quality of the SCADA measurement (*e.g.*, out of scan, inhibited, manual override). Several quality codes can be listed.
- The **Point Name** column displays the name of the SCADA measurement, as used in the SCADA system.
- The **Attribute** column contains a description of the measurement type, as configured in the ATTRIBUTES.description column in the Oracle Utilities Network Management System database for the matching attribute.

## Toolbar and Menu Options

### File Menu

Menu Option	Description	Toolbar Icon
Reload	Reloads the SCADA Summary table.	
Print...	Displays the Print Preview window, from which you can view and print the summary.	
Exit	Closes the SCADA Summary window.	--

### Actions Menu

Menu Option	Description	Toolbar Icon
Inhibit	<b>Inhibit</b> sets the <i>inhibit</i> quality code for the selected SCADA measurement. This suppresses any new updates from SCADA.	
Cancel Inhibit	<b>Cancel Inhibit</b> removes the <i>inhibit</i> quality code from the selected SCADA measurement. This allows any new updates from SCADA to be displayed.	
Manual Entry...	<b>Manual Entry</b> allows you to enter a new value for the selected SCADA measurement. When a changed SCADA value is received by the system, it replaces the manually entered value.	
Manual Override...	<b>Manual Override</b> allows you to enter a new value for the selected SCADA measurement. When a new SCADA value is received by the system, the measurement is blocked and the manually entered value remains.	
Cancel Override	<b>Cancel Override</b> cancels the manual override for the selected measurement and reverts the selected measurement to the last received value from the SCADA system.	
View...	<b>View</b> focuses the Viewer on the device.	

### Filter Menu

Menu Option	Description	Toolbar Icon
Filter Dialog...	Displays the Filter dialog box. The Filter Dialog option on the Filter menu performs the same function. See <b>Using the Filter Dialog</b> on page 1-12 for more information.	--




Menu Option	Description	Toolbar Icon
All	Displays all rows in the SCADA Summary table.	--
Analogs	Displays rows with analog values.	--
Digitals	Displays rows with digital values.	--
Equipment	Displays rows with equipment values.	--
Statuses	Displays rows with status value.	--

### Help Menu

Menu Option	Description	Toolbar Icon
SCADA Summary Help	Opens the online help system to the SCADA Summary help content.	--

## Preventing Updates from SCADA

To prevent a SCADA measurement from accepting updates from SCADA, complete these steps:

1. Select **SCADA Summary...** from the Tools menu in Web Workspace. The SCADA Summary window opens.
2. Select a row in the SCADA Summary list that belongs to the device you want to inhibit.
3. Click the **Inhibit** button (  ).

## Manual Entry and Override of SCADA Values

Occasionally, you may need to manually enter a status, digital value, or analog value for a SCADA measurement. For example, you may need to enter fault current and a fault current indicator to trigger Fault Location Analysis (if applicable). See **Fault Location Analysis** on page 13-1 for more information.

If the value for the selected measurement is a switch status measurement (*i.e.*, open/close), you can choose **Show Control Tool...** from the pop-up menu to manually operate the switch. Otherwise, use the following procedure to enter a value manually:

1. Select **SCADA Summary...** from the Tools menu in Web Workspace. The SCADA Summary window opens.
2. Select the SCADA measurement row in the SCADA Summary list.
3. Click either the **Manual Entry** or **Manual Override** button.

**Note:** Manual Entry allows future SCADA value changes to replace the manually entered value. Manual Override prevents SCADA measurements received by the system from changing the manually entered value. Manual Override can be useful when testing specific devices or RTU communications offline, since the test operations can be prevented from creating outages in Oracle Utilities Network Management System by putting manual overrides on the appropriate status measurements.

If the value for the measurement is a multi-state digital, analog, or any type of measurement other than a switch status measurement (open/close), a dialog box opens, allowing you to enter a value.

**Note:** Multi-state digitals are not available through the Oracle Utilities Network Management System SCADA ICCP Block 1, 2, and 5 Adapter.

4. Select or enter the value you want to change the measurement to.
5. Click **OK**.

**Note:** Clicking on the Manual Override button “blocks” any new values coming from the SCADA measurement. It does not affect the physical SCADA device, it only blocks the value reported by the SCADA device to Oracle Utilities Network Management System.

## Sorting and Filtering

The SCADA Summary table supports **Quick Sorting**, **Dynamic Filtering**, and **Auto Filtering**.

# Using the Alarms and Devices Lists

The Alarms and Devices Lists window provides the following views:

- **Abnormal Devices List**
- **Device Operations List**
- **SCADA Alarms List**
- **System Alarms List**

To display the Alarms and Devices Lists window, select **Alarms and Devices Lists** from the Web Workspace Tools menu, then select one of the views above.

All views support the following functions:

- **Menus and Toolbar**
- **Acknowledging Alarms**
- **Silencing Alarms**
- **Removing Alarms from the List**
- **Turning Audio Notification On and Off**
- **Preventing a Device from Reporting SCADA Alarms**

## Abnormal Devices List

The Abnormal Devices view displays all devices that are not in their nominal state. For example, if a switch that is nominally closed is currently open, it will display in the Abnormal Device Summary. If a SCADA system is integrated with Oracle Utilities Network Management System, any devices that are reported by a SCADA point as being in an off-nominal state will also display. This will also display any wire downs or jumpers, or emergency cables in either an open or closed state.

To access the Abnormal Device Summary, select **Alarms and Devices Lists>Abnormal Device Summary...** from the Work Agenda Tools menu.

The Abnormal Devices List displays the following fields:

- The **Date** column contains the date and time that the device was last operated.
- The **Feeder** column contains the name of the feeder that serves the abnormal device.

- The **Device** column contains the name of the abnormal device.
- The **Description** column contains a description of the operation that caused the abnormal state.
- The **Source** column contains the source of the abnormal operation.
- The **Value** column contains the current state of the device.
- The **Phase** column contains the phases of the device.
- The **Attribute** column contains the type of operation. In the Abnormal Devices List, this column displays 'status.'
- The **Nominal** column contains the normal state of the device.

Related Topics:

- [Silencing Alarms](#)
- [Removing Alarms from the List](#)
- [Turning Audio Notification On and Off](#)

## Device Operations List

The Device Operations List displays all recent operations performed in the user's control zones.

To access the Device Operations List, select **Alarms and Devices Lists>Device Operations List...** from the Work Agenda Tools menu.

This list displays the same columns as the **Abnormal Devices List**.

Related Topics:

- [Silencing Alarms](#)
- [Removing Alarms from the List](#)
- [Turning Audio Notification On and Off](#)

## System Alarms List

The System Alarms List displays a list of all system alarms.

To access the System Alarms List, select **Alarms and Devices Lists> System Alarms List...** from the Work Agenda Tools menu.

The System Alarms List displays the following fields:

- The **Date** column contains the date and time the alarm was generated.
- The **Description** column contains a description of the alarm.
- The **Source** column contains the originator of the alarm.
- The **Who Ack** column contains the ID of the user who acknowledged the alarm.
- The **Time Ack** column contains the date/time stamp when the alarm was acknowledged.

Related Topics:

- [Silencing Alarms](#)
- [Removing Alarms from the List](#)
- [Turning Audio Notification On and Off](#)
- [Preventing a Device from Reporting SCADA Alarms](#)

## SCADA Alarms List

The SCADA Alarms view is only available if your system supports SCADA extensions. For more information about SCADA extensions, see **SCADA Extensions** on page 8-1.


To access the SCADA Alarms List, select **Alarms and Devices Lists>SCADA Alarms List...** from the Work Agenda Tools menu.

The SCADA Alarms List displays the following fields:



- The **Date** column contains the date and time the alarm was generated.
- The **Feeder** column contains the feeder on which the device in the alarm is located.
- The **Device** column contains the identification of the device associated with the alarm.
- The **Description** column contains a description of the alarm.
- The **Source** column contains the originator of the alarm.
- The **Value** column contains the last reported measurement value. The value can be status, digital, or analog. For status measurements, typically a value of “0” indicates open and a value of “1” indicates closed. Any special tags placed on the device would be indicated by a digital value.
- The **Phase** column contains the phase of the measurement, described as A, B, C, or a combination of phases.
- The **Attribute** column contains the type of SCADA measurement (*e.g.*, current, voltage).
- The **Nominal** column contains the nominal value of the measurement that is in alarm (only for digital).
- The **Quality** column provides additional information about the SCADA measurement (*e.g.*, out of scan, inhibited, manual override) that is in alarm.
- The **Limit** column contains the configurable threshold value. If the analog crosses a low or high threshold, the system creates a limit alarm, and the threshold value appears here.
- The **Who Ack** column contains the ID of the user who acknowledged the alarm.
- The **Time Ack** column contains the date/time stamp when the alarm was acknowledged.



## Menus and Toolbar

### File Menu

Menu Option	Description	Toolbar Icon
Print...	Opens the print dialog box to allow you to print the current list.	
Exit	Closes the window.	

### Actions Menu

Menu Option	Description	Toolbar Icon
Acknowledge	Acknowledges the selected alarms.	
Clear	Clears the selected alarms.	

Menu Option	Description	Toolbar Icon
<b>Silence</b>	Silences the selected alarms.	
<b>View...</b>	Shows the associated device in the Viewer.	
<b>SCADA Summary...</b>	Displays the SCADA Summary for the selected entries.	--

**Note:** Toolbar action options are also displayed as pop-up menu options when you right-click a row in the alarm list.

### Filter Menu

Menu Option	Description	Toolbar Icon
<b>Show Filter Dialog</b>	Opens the Filter dialog box, allowing you to create, modify, apply, and save user-defined filters.	--
<b>All</b>	Displays all alarms of the selected alarm type.	--
<b>Device Operations List</b>	Opens the Device Operations view.	--
<b>SCADA Alarms List</b>	Opens the SCADA Alarms view.	--
<b>System Alarms List</b>	Opens the System Alarms view.	--

### Help Menu

Menu Option	Description	Toolbar Icon
<b>Help</b>	Opens the online help content.	--

## Acknowledging Alarms

To acknowledge an alarm, complete these steps:

1. In the Alarms and Devices List, select the row of the alarm you want to acknowledge.
2. Click the **Acknowledge** button. The following occurs:
  - The alarm becomes acknowledged.
  - Its audible alarm is silenced.
  - Your user name appears in the Who Ack field.
  - The current date and time appears in the Date Ack field.

## Silencing Alarms

To silence an alarm, complete these steps:

1. In the Alarms and Devices List, select the row of the alarm you want to silence.
2. Click the **Silence** button.
  - The audio notification for the alarm becomes silent.
  - The alarm is still not acknowledged.
  - Subsequent new alarms will cause the audio notification to sound.

## Removing Alarms from the List

To remove an alarm from the Alarms and Devices List, complete these steps:

1. In the Alarms and Devices List, select the row of the alarm you want to silence.
2. Click the **Clear** button. The alarm disappears from the list.

**Note:** You can remove multiple alarms by selecting multiple rows before you click the Clear button. Select multiple rows by clicking a row, holding the mouse button, and dragging the pointer over the additional rows.

## Turning Audio Notification On and Off

To turn audio notifications on or off, select **Audio Enabled** from the Web Workspace **Preferences** menu. The audio for the entire system (all alarms) will toggle on or off.

## Preventing a Device from Reporting SCADA Alarms

To prevent a device from reporting Alarms, complete these steps:

1. In the Alarms and Devices List, select the row of an alarm that belongs to the device you want to inhibit.
2. Click the **Inhibit Alarm** button.
  - The device will not report SCADA alarms until the inhibit is cancelled.
  - An “I” appears next to the device in the Viewer indicating the device is inhibited.
  - An “I” appears in the Quality columns of the SCADA Alarms List and the SCADA Summary.


**Note:** Inhibiting alarms does not affect the physical SCADA device; it only prevents Oracle Utilities Network Management System SCADA Extensions from reporting an incoming alarm.

## Using the User Log

The User Log displays a log of actions taken by a user.



To open the User Log, select **User Log...** from the Web Workspace Tools menu.

The User Log displays the following fields and buttons:






- The **User ID** field opens with the current user’s identification, but the field may be edited to load log entries for a different user; for a different user log, enter their user ID and click .
- The **Begin Time** and **End Time** fields allow you to filter the User Log by time. To load log entries for a specific time period:
  - Enter a starting date in the Begin Time field.

- Enter an ending date in the End Time field.

**Note:** You can enter a beginning date, an ending date, or both.

- Click the  button. The list is refreshed to display only entries with a date and time greater than or equal to the Begin Time and less than or equal to the End Time.
- The **User Comment** field allows you to enter a user comment log entry. Type the note text into this field and then click the add button (  ).

**Note:** The **User Log** does not automatically refresh, so the new comment will not appear in the table until the user log is reloaded.

- The **Date/Time** field displays the date/time at which the log entry occurred.
- The **Event** field displays the Event # associated with the log entry.
- The **Text** field displays a description of the log entry.
- The  button displays the Print Preview dialog, which allows you to view or print the log.
- The  button loads the User Log for the for the current filter parameters (User ID, Begin Time, and End Time).
- The eraser button (  ) clears the User Log.
- The target button (  ) displays the device associated with the log entry in the Viewer.
- The  displays the Event Details window for the event associated with the log entry.





# Chapter 2

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## Web Trouble

This chapter describes the **Oracle Utilities Network Management System (NMS) Web Trouble** application. It includes the following topics:

- **Overview**
- **Managing Events with Web Trouble**
- **Managing Crews with Web Trouble**
- **Managing Calls with Web Trouble**

### Overview

**Oracle Utilities Network Management System - Web Trouble** augments the **Web Workspace** module with crew and event management capabilities. **Web Workspace's** crew dispatch and management functions facilitate operations in daily maintenance and outage restoration situations.

The windows, menu bar, and buttons on the **Web Trouble** window are common to both Web Trouble and Web Workspace. Refer to **Getting Started with Web Workspace** for details on using common application components.

## Managing Events with Web Trouble

**Web Trouble** includes tools that build upon the **Web Workspace** to help you manage trouble events. This section describes those tools and how to perform basic event functions. It includes the following topics:

- **Event Details**
- **Setting the Work Queue**
- **Event Grouping**
- **Associating and Unassociating Calls with Devices**
- **Associating Damage Assessments to an Event**
- **Working with AMI Requests**
- **Updating the ERT for Selected Events**
- **Setting the System-Wide Estimated Restoration Time**
- **Using the Event Log**

### Event Details

The **Event Details** window is used to enter and track information about the cause of an event and how the event is resolved. It displays event information, including crew contact details, both the begin and restoration times for the event, any partial restoration steps, and the operations event note. Some information is automatically entered into **Event Details**, and you can manually override some of this data. In addition, you can complete events from this window, giving you an opportunity to enter more detail about the event and validate the completion for proper event reporting.

This section contains the following topics:

- **Using the Event Details Window**
- **Updating the Estimated Restoration Time**
- **Recording Failed Equipment Information**
- **Copying Event Details to Related Partial Restoration Events**
- **Completing an Event**

#### Using the Event Details Window

To open Event Details, double-click the desired event's row in the Work Agenda. You can also select an event and then click the **Event Details** toolbar button or select **Event Details...** from the Actions menu.




The Event Details window is comprised of:

- **Menus and Toolbar**
- **Event Information Pane**
- **Job Actions Tab**
- **Completion Actions Tab**
- **Equipment Failure Tab**







## Menus and Toolbar

The Event Details window displays a toolbar, as well as a Help and File. The Help menu displays the standard Help and About options. The table below describes the options on the File menu.

### File Menu

Menu Option	Description	Toolbar Icon
<b>Save</b>	Saves the current event. If the event has already been completed, you are prompted to provide a reason for the update.	
<b>Print Tab...</b>	Opens the Print Preview dialog and allows you to print the current contents of the Job Actions tab.	
<b>Print All...</b>	Opens the Print Preview dialog and allows you to print the contents of all three Event Details tabs.	
<b>Exit</b>	Exits Event Details. You must press the <b>Save</b> button before pressing the <b>Exit</b> button if you wish to save any revisions you may have made.	--

### Actions Menu

Menu Option	Description	Toolbar Icon
<b>Complete Event</b>	Sets the status of the current event to Complete. If the required fields (Remedy and Failure) have not been entered, this option will not be available. This option is not available when the event is a switching job or planned outage.	
<b>Maintenance</b>	Sets the status of the current event to Maintenance Pending. If the required fields (Remedy and Case Note) have not been entered prior to selecting, an error will be displayed that will list the missing information.	
<b>Copy</b>	Copies the case notes and details for the currently loaded event to all other events related to it based on its partial restoration.	
<b>Event Log...</b>	Opens the Event Log.	
<b>Switching...</b>	Opens the <b>Open or Create New Switching Sheet</b> dialog, which allows you to create a new switching sheet or open a switching sheet associated with the selected event.  This option is only available if you running Web Workspace with Web Switching Management. See <b>Open or Create New Switching Sheet</b> on page 9-59 for more information.	
<b>View...</b>	Show device associated with the event in the Viewer.	

## Event Information Pane

The top section of the Event Details window contains event attributes:

- The **Event #** is the number the system has assigned to the event.
- The **Device** is the name of the device associated with the event.
- The **Switching Plan #** is the switching sheet number associated with the event, if any. The switching sheet number is prefixed by the switching sheet type.
- **Zone** displays the control zone(s) where the associated device is located.

## Job Actions Tab

The Job Actions tab lets you view detailed information about the event. The first section displays summary information about the event, including the duration and scope of the event. The second section displays partial restoration information. The third section allows you to enter estimated restore and repair time information as well as operations event notes. The fourth section allows you to manage crew contact times. The fifth section contains buttons that let you perform various actions associated with the event (*e.g.*, save any changes).

For instructions on updating the ERT, see **Updating the Estimated Restoration Time** on page 2-7.

The Job Actions tab displays the following fields and buttons:

- **Event Began** contains the date and time at which the event began. This field is editable except for switching jobs. For switching jobs, you must edit the Completed Date in the switching step itself. See **Steps Tab** on page 9-19 for more information.
- **Est # of Cust Out** contains the estimated number of customers experiencing an outage for this event.
- **Event Restored** contains the date and time of event restoration (*i.e.*, when the outage area was re-energized). This field is editable except for switching jobs. For switching jobs, you must edit the Completed Date in the switching step itself. See **Steps Tab** on page 9-19 for more information.

The **Partial Restoration Log** table displays information related to restoration if the event is restored in stages. This table does not display when the event is a non-outage. This table contains the following columns:

- The **# Cust Out Before** column contains the total number of customers out at each stage.
- The **Operation Time** column contains the date and time of the operation. The **Device** column displays the device operated at each stage.
- The **# Cust Restored** column contains the total number of customers that were restored at each stage.
- The **# Cust Added** column contains the total number of customers that were added at each stage.
- The **# Cust Out After** column contains total number of customers still without power after each stage.
- The **Remarks** column contains any comments or remarks entered by the user.
- The **Event #** column contains the event number associated with each partial restoration step.
- The **Est Time to Restore (HH:MM)** field displays the estimated time from the current time to complete the restoration in hours and minutes. The Est Time to Restore (HH:MM) field is not displayed when the event is a non-outage or switching job. To set the ERT, enter a value in this field and click the Update ERT button.

- The **Est Restore Date** fields display the date and time of estimated restoration. The Est Restore Date fields are not displayed when the event is a non-outage. To clear the ERT (leave it blank), click the Clear ERT button.
- The **Est Time to Repair (HH:MM)** field is used to enter the estimate time to repair in hours and minutes. This field is used when the crew on-site is only assessing the job and providing an estimate for the time it will take another crew to do the work. This field is editable, and Oracle Utilities Network Management System Storm Management uses the value, if installed. The Est Time to Repair (HH:MM) field is not displayed when the event is a switching job.
- The **Operations Event Note** is a text field for you to enter notes about the event. These are notes that are made available to the call takers to pass on any specific details about the event to new callers associated with this event.

### En Route/Onsite Crews Section

- The **Next Crew Contact Required at** table displays when the operator next anticipates receiving contact from the associated crew(s).

Use the **Reset Selected Crew Contact Time** button to reset the crew contact time to the date and time you enter in the **Date** field beside this button.

- The En Route/Onsite Crews table contains the following columns:
  - The **Crew ID** column of the table contains the crew name.
  - The **Contact** column displays the contact name for the assignment.
  - The **Mobile #** is the mobile phone number of the crew.
  - The **En Route Date** column contains the time at which the crew was placed en route to the event. This column is empty if the crew has not arrived yet.
  - The **On Site Date** column contains the time at which the crew arrived on site.
  - The **Contact Required By** column contains the date and time at which the next contact is expected.

### Completion Actions Tab

The Completion Actions tab lets you view detailed information about the event, as well as enter information about the actions taken to complete the event. The first section displays summary information about the event, including the duration and scope of the event. The second section lets you enter information about the cause of the outage, the affected system and subsystem, environmental factors, and the actions that were taken to restore the outage. The third section allows you to exclude the event from the interruption indices calculations. The fourth section displays a log of changes made to the event details after the event was completed. The fifth section contains buttons that let you perform various actions associated with the event (*e.g.*, complete the event).

For instructions on completing an event, see **Completing an Event** on page 2-8.

The Completion Actions tab displays the following fields and buttons:

- **Event Began** contains the date and time at which the event began. This field is editable except for switching jobs.
- **Est # of Cust Out** contains the estimated number of customers experiencing an outage for this event.
- **Event Restored** contains the date and time of event restoration (*i.e.*, when the outage area was re-energized). This field is editable except for switching jobs.
- The **Details** section displays the following drop-down lists.

- The **System** drop-down lets you specify what type of system the failure is on (*e.g.*, overhead transmission, underground distribution, supply, etc.).
- The **Sub-System** indicates whether the sub-system is primary or secondary, radial or mesh, or a service drop.
- The **Type** drop-down lets you specify the type of device that is experiencing the problem.
- The **Failure** drop-down lets you specify the type of failure that is occurring.
- The **Interrupting Device** drop-down lets you specify the type of interrupting device involved with the event.
- The **Weather** drop-down lets you specify weather conditions at the time of the event.
- The **Environment** drop-down lets you specify environmental factors that have been involved with the event, such as humidity and salt spray.
- The **Vegetation** drop-down lets you specify the type of vegetation issues involved with the event, such as tree or vine, location (on or off ROW), and severity (contact or uprooted).
- The **Foreign Interference** drop-down lets you specify animals, vehicles, or any other type of foreign body that has contributed to the event.
- The **Defective Equipment** drop-down lets you specify the type of equipment defect involved with the event (*e.g.*, age deterioration, customer equipment, etc.)
- The **Scheduled** drop-down lets you specify whether or not the event was planned and if it was planned for safety purposes.
- The **Utility Error** drop-down lets you specify the reason for the event if it was caused by the utility company.
- The **Other** drop-down lets you specify if the cause is something other than that listed in the drop-down menus or if the cause is unknown.
- The **Remedy** drop-down lets you specify the task performed to resolve the event.
- The **Interruption Indices** section displays the following fields:
  - The **Exclude This Event** checkbox allows you to designate if you want to exclude this event from the interruption indices calculations done by the Oracle Utilities Network Management System – Trouble Reporting application. The Exclude from Interruption Indices checkbox is not displayed when the event is a switching job or planned outage.
  - The **Reason for Exclusion** field provides free-form text entry of the reason for the exclusion of this event from the interruption indices. The Reason for Exclusion field is not displayed when the event is a switching job or planned outage.
- The **Post-Completion Edit Log** table displays information related to event details being edited after the event is completed. This table contains the following columns:
  - The **Who** column contains the user ID of who performed the edit.
  - The **Date** column contains the date and time of the edit.
  - The **Reason** column contains a description of why the edit was made.
  - The **Field** column contains the name of an **Event Details** field that changed after the event was completed.
  - The **Previous Value** column contains the value of the field prior to the change.

**Note:** if multiple fields are edited post-completion, each change will be listed in a separate row.

## Equipment Failure Tab

The Equipment Failure tab lets you record detailed information about any failed equipment related to an event. You can record and track the type of equipment that failed, the manufacturer, serial number, and voltage details.

For instructions on entering failed equipment details, see **Recording Failed Equipment Information** on page 2-7.

The Equipment Failure tab displays the following fields and buttons:

- **Item** is automatically populated with the Failure option selected in the Event Details tab.
- The **Manufacturer** drop down menu provides a list of manufacturers to select from.
- **Serial #** is an editable (alphanumeric) field for you to enter the serial number for the equipment.
- **Date of Manufacture** is an editable (date/time) field for you to enter the date of manufacture of the equipment.
- **Date of Installation** is an editable (date/time) field for you to enter the date of installation of the equipment.
- **Primary Voltage** is an editable (alphanumeric) field for you to enter the primary voltage of the equipment.
- **Secondary Voltage** is an editable (alphanumeric) field for you to enter the secondary voltage of the equipment.
- **Rating** is an editable (alphanumeric) field for you to enter the rating of the equipment. The drop-down menu beside the Rating field allows you to select the rating units.
- **Phase** allows you to designate whether the equipment is single-phase or three-phase.
- **Type** is an editable (alphanumeric) field for you to enter the type of equipment.
- **Size** is an editable (alphanumeric) field for you to enter the size of the equipment.

## Updating the Estimated Restoration Time

After a crew has arrived onsite and provided information regarding when the event will be restored, you can update this information using Event Details. To update the estimated restoration time, complete these steps:

1. Select the event in the Work Agenda window.
2. Click the **Event Details** toolbar button or select **Event Detail...** from the Actions menu. The Event Details window opens.
3. On the Job Actions tab, enter the amount of time (in hours and minutes) that the crew will take to restore the outage in the **Est Time to Restore** field.
4. Click the **Update ERT** button. The updated time displays in the Est Restore Date fields, and other windows that display the Est Restore Date will be updated.

## Recording Failed Equipment Information

To record information about a failed device, complete these steps:

1. From the Event Details window, click on the Equipment Failure tab.
2. Select the manufacturer from the **Manufacturer** drop down menu.
3. Enter the serial number, dates of manufacture and installation, primary and secondary voltage, rating, type, and size of the equipment, as applicable.
4. Click on the drop-down list next to the **Rating** field and select the rating unit, as applicable.
5. Select the **Phase**.

6. Click the **Save** toolbar button. The information is saved to the database for the event. The Event Details tab re-displays.

## Copying Event Details to Related Partial Restoration Events

You can copy the case notes and other event details for the currently loaded event to all other events related to it based on its partial restoration.

**Note:** Any previously stored Event Details information for the related events will be overwritten (except for system-populated fields such as Event #, Device, Zone(s), Event Began, Est # of Cust Out, and Event Restored).

1. Select the event in the Work Agenda window.
2. Click the **Event Details** toolbar button or select **Event Detail...** from the Actions menu. The Event Details window opens.
3. Make any desired changes to the event details. Any comments you enter in the Operations Event Note will be applied to all related partial restoration events.
4. Click the **Copy** toolbar button or select **Copy** from the Actions menu. The corresponding event details are copied to all related partial restoration event(s) of the currently displayed event. Note that ERT information is only copied to active related events.

## Completing an Event

After a crew has reported that an event is complete, you can update the event information in the Event Details window and complete the event. To complete an event, follow these steps:

1. Select the event in the Work Agenda window.
2. Click the **Event Details** toolbar button or select **Event Detail...** from the Actions menu. The Event Details window opens.
3. Click the **Completion Actions** tab.
4. Select the appropriate options from the drop-down menus. You must select either a Failure or a Remedy; additional options may be required, based on your configuration. Once the required options have been provided, the **Complete Event** button is enabled.
5. Click the **Complete Event** button or select **Complete Event** from the Actions menu. The event information is updated, the event is marked as “complete,” and the Event Details window closes.

**Note:** if you do not select a Failure or Remedy prior to selecting Complete Event, the system will display a Validation error message to notify you that a Failure and/or Remedy is required.

## Confirm Outages

If you need to confirm a probable service outage or create new confirmed service/secondary outage events when a crew reports in from a site, you can use the Confirm Outages window. This window displays a table listing either all of the customers downstream of the predicted or confirmed outage device (when accessed from the Work Agenda) or all of the customers connected to the selected device (when accessed via the Control Tool).

This section includes the following topics:

- **Using Confirm Outages Window**
- **Creating a Confirmed Service Outage**
- **Creating a Confirmed Secondary Outage**
- **Creating a Confirmed Service and Secondary Outage for the Same Customer**



- **Restoring a Customer with a Confirmed Service or Secondary Outage**

## Using Confirm Outages Window

To access the Confirm Outages window, do one of the following:

- Select **Confirm Outages...** from the Work Agenda Actions menu.
- Select a device in the Viewer that has customers connected to it, bring up the Control Tool, then click on the **Confirm Outages...** button.

The Confirm Outages window displays the following columns:

- The **Device** column contains the name of the device the customer is connected to.
- The **Address** column contains the customer's address.
- The **Name** column contains the name of the customer.
- The **Customer Type** column contains the customer type code.
- The **Prediction** column contains "Confirmed Service" to indicate the customer is involved in a probable service outage, "Confirmed Secondary" to Otherwise, it is blank.
- The **Restored** column contains "Yes" to indicate the customer has had their confirmed service or confirmed secondary outage restored. However, information must be entered in the Event Details window in order to complete it. Otherwise, it is blank.
- The **Grouping** column contains "Yes" if the the confirmed outage has been made groupable.
- The **Event #** column displays the number the system has assigned to the customer's event. If a customer call is made groupable, the event number will change if the call is grouped to an existing or repredicted event.
- The **Call Time** column displays the time when the customered call was received.
- The **Telephone** column contains the customer's telephone number.
- The **Account #** column contains the customer's account number.



## Color Coding

The rows in the Confirm Outages window are color-coded to designate when a customer has a confirmed service outage, a confirmed secondary outage, or when the customer has been restored. When a customer is affected by multiple outages, multiple rows will be displayed representing the different outages.



Color	Description
Green	Confirmed Service Outage
Orange	Confirmed Secondary Outage
Blue	Restored

## Confirm Outages Menus and Toolbar

### File Menu

Menu Option	Description	Toolbar Icon
<b>Print...</b>	Opens the print dialog box to allow you to print the current list.	
<b>Refresh</b>	Refreshes the data.	
<b>Exit</b>	Closes the Confirm Outages window.	--

### Actions Menu

Menu Option	Description	Toolbar Icon
<b>Confirm Service</b>	Confirms a service outage for the selected row(s).	--
<b>Confirm Secondary</b>	Confirms a secondary outage for the selected row(s)	--
<b>Restore</b>	Sets the outage to restored. The Restored column is populated with <i>Yes</i> .	--
<b>Make Groupable</b>	Sets a non-fuzzy call to groupable. The Groupable column is populated with <i>Yes</i> .	--
<b>Event Details...</b>	Opens the Event Details window for the selected event, if applicable.	
<b>View...</b>	Shows the associated device in the Viewer.	

### Help Menu

Menu Option	Description	Toolbar Icon
<b>Confirm Outages Help</b>	Opens the Confirm Outages online help content.	--

## Creating a Confirmed Service Outage

To create a confirmed service outage for a customer, complete these steps:

1. Select the row in the Confirm Outages window for the applicable customer.
2. Select **Confirm Service** from either the right-click option menu or from the Actions menu.
3. The Confirm Outages window refreshes. The row for the selected customer is now colored green, and the **Prediction** column is now populated with “Confirmed Service”. A new event row appears in the Work Agenda Trouble Event list. A **CSVO** symbol appears on the customer’s device in the Viewer window.

## Creating a Confirmed Secondary Outage

To create a confirmed secondary outage for a customer, complete these steps:

1. Select the row in the Confirm Outages window for the applicable customer.
2. Select **Confirm Secondary** from either the right-click option menu or from the Actions menu.
3. The Confirm Outages window refreshes. The row for the selected customer is now colored orange and the **Prediction** column is now populated with *Confirmed Secondary*. A new event row appears in the Work Agenda Trouble Event list. A **CSCO** symbol appears on the customer's device in the Viewer window.

## Creating a Confirmed Service and Secondary Outage for the Same Customer

To create a confirmed service outage and secondary outage for a customer, complete these steps:

1. Select the row in the Confirm Outages window for the applicable customer.
2. Select **Confirm Service** as described above; the Confirm Outages window will refresh with the confirmed service data. Likewise, with the same row selected, select **Confirm Secondary**.
3. The Confirm Outages window refreshes. There are now 2 rows for the customer with **Prediction** column populated with the outage type (*i.e.*, **Confirmed Service** and **Confirmed Secondary**). Both a CSVO and CSCO symbol appear on the customer's device in the Viewer window.

## Restoring a Customer with a Confirmed Service or Secondary Outage

To restore a confirmed service or secondary outage for a customer, complete these steps:

1. Select the row in the Confirm Outages for the applicable customer.
2. Select **Restore** from either the right-click option menu or from the Actions menu.
3. The Confirm Outages window refreshes. The row for the selected customer is now colored blue and the **Restore** column is populated with *Yes*. The CSVO/CSCO symbol disappears from the customer's device in the Viewer window (or the CSVO/CSCO numbers are decreased by one).

## Setting the Work Queue

To set a Work Queue value for an event, complete these steps:

1. Select the desired event's row in the Work Agenda.
2. Click on the **Referral** toolbar button or select **Referral...** from the Actions menu. The Work Queue dialog appears.
3. Select a value from the **Refer To** list.
4. Enter any desired remarks into the **Remarks** field.
5. Click the **OK** button. The Work Queue dialog disappears, and the Work Queue column of the selected row updates with the selected Refer To value.

## Event Grouping

While the system automatically groups events according to the trouble analysis rules, you may come across some events that are related, but are not grouped because of data modeling issues (e.g., connectivity problems). You can manually group these events together using the Group Events dialog box.

### Group Events Dialog Box

The Group Events dialog box allows you to group events. To open the Group Events dialog box, select **Group Events** from the Actions menu in the Work Agenda window.

The Group Events Dialog displays the following fields:

- The **Selected Events** area displays all of the events that have been selected for grouping.
- The **Group Method** contains a selection of grouping options:
  - The **merge** option is used for event grouping.
  - The **relate** option does not group the selected events, but rather allows you to record a relationship between the events and enter notes in the Relationship Comments field.
  - The **unrelate** option allows you to remove one or more previously related events from the relationship.
- The **Relationship Comments** field allows you to enter comments about the relationship when the Group Method is set to *relate*.

### Grouping Events

To group events, complete these steps:

1. Open the Group Events dialog box by selecting **Group Events** from the Work Agenda Actions menu.
2. Make sure the **Group Method** is *merge*.
3. In the Trouble Events list, select the row for the event that all subsequent events will be grouped to. The event number appears in the Selected Events field.
4. Select the row of an event in the Trouble Events list that you want to group to the first selected event. The event number for the event is added to the Selected Events field.
5. If there are other events you want to add, select the row for those events in the Trouble Events list. The event numbers for the events are added to the Selected Events field.
6. To deselect a selected event, select its row again. The event number is removed from the Selected Events field.
7. Click on the **OK** button.
  - The selected events are grouped to the first selected event.
  - The rows for the subordinate events disappear from the Trouble Events List.
  - The number of customer calls are added together and their sum appears in the # Calls column.

## Grouping Rules

If the events that you selected do not meet the manual grouping rules, the system will not let you group them. An error message will appear explaining the problem. Manual grouping rules include the following:

- General fuzzy events can group to any outage.
- Fuzzy events associated with a control zone can only group to other events in the same control zone.
- Non-outage events can group to outage or non-outage events.
- Outage events can group to other outage events, but outage events cannot be grouped to other outage events that they are not downstream of.
- Real outages (*i.e.*, outages that have a device opened/closed in the Viewer causing a segment of the model to be de-energized) cannot group to one another.
- Outage events cannot group to non-outage events.
- Meets (*e.g.*, meet fire, etc.) cannot group to anything.
- Switching jobs cannot group to anything.

## Graphical Grouping (Supply Points Mode)

To add customers to an event graphically, follow these steps:

1. Select a probable outage in the Work Agenda.
2. Click the **Trouble Info** toolbar button or select **Trouble Info...** from the Actions menu to display the Trouble Info callers for this outage.
3. Select **Supply Points** from the File menu to display the Supply Point Summary.
4. In the Viewer, press the **Supply Points Mode** button to toggle into Supply Points mode.
5. Using a box or polygon, select a group of supply points. All supply points inside the box or polygon are highlighted. (See **Selecting Devices** on page 1-43 for details on selecting devices in the Viewer.)
6. Do one of the following:
  - To add a single supply point, right-click on the supply point and select **Add Supply Points** from the pop-up menu. A row is added to the Trouble Info Supply Points table in green and marked as To Be Grouped (TBG).
  - To add all highlighted supply points, hold down the Alt key and right-click on a highlighted supply point, then select **Add Supply Points** from the pop-up menu. The Supply Points rows are added to the Trouble Info Supply Points table in green and marked as To Be Grouped (TBG).

**Note:** To display a list of highlighted supply points, Alt-right-click and then select **Show Supply Points** from the pop-up menu. The Supply Point Summary table on the Trouble Info window displays details for the highlighted supply points.
7. Press the **Update Event** button on the Trouble Info Supply Points view to group the Supply Points into the event.

8. Enter an event grouping threshold (in hours) in the Update Job confirmation dialog.
  - The selected event will now include the selected supply points and the Work Agenda row will now reflect the new customer count and call count, if other calls existed on the selected Supply Points.
  - Supply Points with calls that did not pass the selected grouping threshold are not added to the outage and will be marked in yellow with FAIL in the Grp column.
  - You can also remove Supply Points from the event by selecting them and clicking the **Remove** button, then the **Update Event** button. Any calls on the removed Supply Points will create new events.

## Relating Events

To relate events, complete these steps:

1. Open the Group Events dialog box by selecting **Group Events** from the Work Agenda Actions menu.
2. Change the Group Method to “relate.” The Relationship Comments field is now accessible.
3. In the Trouble Events list, select the row for the event that all subsequent events will be related to. The event number appears in the Selected Events field.
4. Select the row of an event in the Trouble Events list that you want to relate to the first selected event.
5. If there are other events you want to add, select the row for those events in the Trouble Events list. The event numbers for the events are added to the Selected Events field.
6. Type a comment into the Relationship Comments field, if desired.
7. Click the **OK** button. The selected events are related to one another. The **Grp Type** column in the Work Agenda for each event now contains “REL”, the **Rel Type** column now contains “R”, and **Rel Event #** column now contains the event number of the earliest event.

## Unrelating Events

To unrelate events that have been related, complete these steps:

1. Open the Group Events dialog box by selecting **Group Events** from the Work Agenda Actions menu.
2. Change the Group Method to “unrelate.”
3. In the Trouble Events list, select the row for the event that you wish to unrelate. The event number appears in the Selected Events field.
4. If there are other events that you want to unrelate, select the row for those events in the Trouble Events list. The event numbers for the events are added to the Selected Events field.
5. Click the **OK** button. The selected events are unrelated. If two or more events are still part of that relationship, they remain related to each other. If the event that was displayed in the **Rel Event #** column was unrelated and two or more events are still part of that relationship, the **Rel Event #** column is updated with the event number of the earliest event remaining in the relationship.

## Ungroup Events

To ungroup manually grouped events or repredicted upstream device outages, complete these steps:

1. Select a grouped event in Work Agenda.
2. Select Undo Grouping from the Work Agenda Actions menu. The event will be ungrouped and new events will be created for the previously grouped events.

**Notes:**

- You cannot ungroup events with crew assignments, whether assigned, en route, onsite, or suspended.
- If the grouped event was predicted (e.g., a Predicted Device Outage (PDO)), it is destroyed and the event number is lost along with any data entered in Event Details.
- Ungrouped calls are put at the front of the grouping queue and then grouped normally.

## Associating and Unassociating Calls with Devices

Sometimes a call comes in reporting a problem that is not clearly related to a particular customer or device. Until a device is identified for the problem, the event is considered a *fuzzy call*. When more information becomes available, you can associate the fuzzy call with a device. You can also unassociate these calls using the Trouble Info window.

### Associating a Fuzzy Call with a Device

To associate a call with a device, complete these steps:

1. Open a Viewer window and load the map containing the device you want to associate.
2. In the Work Agenda list, select the row of the fuzzy event that you want to associate.
3. In the Work Agenda window, select **Associate Event** from the Actions menu. The Associate Event dialog box opens.
4. In the Viewer, select the device you want to associate the fuzzy call to. The device identification appears in the Device field of the Associate dialog box.
5. Click **OK** in the Associate Event dialog box. The row for the fuzzy event disappears from the Work Agenda, and the Oracle Utilities Network Management System analysis engine re-analyzes the fuzzy call using the selected associated device.

### Unassociating/Reassociating a Call from/to a Device

To unassociate a call from one device and reassociate it to another device, complete these steps:

**Note:** If you are unassociating a call and you want to turn it into a fuzzy call, simply do not select a device to re-associate it with (i.e., omit the third and sixth steps below).

1. In the Work Agenda window, select the row for the event that contains the calls you want to unassociate.
2. Click on the **Trouble Info** toolbar button or select **Trouble Info...** from the Actions menu. Call information about the event appears in the Trouble Info window.
3. Open a Viewer window and load the map containing the new device you would like to re-associate the call(s) with.
4. In the Trouble Info window, select the row for the call you wish to unassociate from its present device.
5. Select **Unassociate** from the Trouble Info Actions menu. The Unassociate dialog box opens.

6. Select a device in the Viewer to populate the New Device field in the Unassociate dialog box.
7. Click **OK** on the Unassociate dialog.
  - The call is unassociated from the current device and associated with the new device, if specified.
  - The Oracle Utilities Network Management System Trouble Management analysis engine re-analyzes the event from which the calls were unassociated, as well as the unassociated calls using their new associated device.

## Associating Damage Assessments to an Event

When a crew out in the field is assessing damage that has occurred, you may wish to record the damage information in NMS. You can use the **Damage Assessment** window to record the type of damage as well as what materials are required to the repair. If multiple damage assessments exist for an event, the system will calculate the estimated repair time by adding together estimated repair times from each active damage assessment. You can also select one or more crew types needed to repair the reported damage.

Damage assessment trouble codes have associated clue symbols, which will be displayed in Viewer at the damage location(s).

**Note:** Damage assessment incidents are not included in counts for the event.

### Using the Damage Assessments Window





To view, edit, or create damage assessment information for an event, open **Damage Assessments** from the Work Agenda:

1. Select an event from the Event List in the Work Agenda.
2. Select **Damage Assessment...** from the Actions menu. The **Damage Assessments** window opens. If any damage assessment records exist for this event, they are displayed in the table.

The **Damage Assessments** window displays summary information on any damage assessment records associated with the event.


### Damage Assessments Menu and Toolbar Options

File Menu -

Menu Option	Description	Toolbar Icon
<b>New...</b>	Create a damage assessment in the Damage Assessment tool.	
<b>Open...</b>	Open the currently selected record in the Damage Assessment window.	
<b>Reload</b>	Reload the table data.	
<b>Print...</b>	Print the content of the Damage Assessments table.	
<b>Exit</b>	Closes the Damage Assessments window.	--



**Actions Menu -**

Menu Option	Description	Toolbar Icon
View...	Focuses the Viewer on the device associated with the selected damage assessment.	

**Filter Menu -**

Menu Option	Description	Toolbar Icon
Active	Show all active Damage Assessments.	--
Complete	Show all complete Damage Assessments.	--
Auto Filter Off	Clears any autofilter values that were set by right-clicking a Damage Assessment record in the table and selecting <b>Auto Filter</b> .	--
Show Filter Dialog	Open the filter dialog to choose filter criteria.	--
All	Show all damage assessments.	--

**Help Menu**

Menu Option	Description	Toolbar Icon
Damage Assessments Help	Opens the online help system to the Damage Assessments help content.	--

**Damage Assessments Table**

- **Status** is the status (Active/Complete) of the listed damage assessment.
- **Event #** is the event number associated with the damage assessment.
- **Report Date** is the date and time when damage assessment was performed.
- **Crew** is the crew that performed the damage assessment.
- **Mobile #** is the crew's mobile number.
- **Feeder** is the name of the feeder.
- **Device** is the device alias.
- **Address** is the damage location address.
- **Region** is the region-level control zone name.

## Creating a New Damage Assessment

To create a new damage assessment:

1. Click the **New** button on the toolbar. The Damage Assessment window opens. The following fields are pre-populated: Event #, Crew (if the outage has a single crew assigned/en-route or onsite), Report Date, Damage Location (based on the location of the outage device), and Phases Affected (based on phases of the outage device).
2. Complete additional fields on this screen as needed. See the following section for field descriptions.
3. Click the **Save** button on the toolbar.
4. Use the **Complete** toolbar button to complete the damage assessment. When a damage assessment record is completed, its status changes to inactive and its symbol is removed from Viewer.

## Damage Assessment Window

Use the Damage Assessment window to enter damage assessment information for an event or device.

The Damage Assessment window is displayed when you do one of the following:

- Click the **Damage Assessment...** option from the Actions menu in the Work Agenda, and then click the **New Damage Assessment** or **Open Selected Damage Assessment** button from the Damage Assessments window.
- Click the **Damage Assessment...** button from the Control Tool, and then click the **New Damage Assessment** or **Open Selected Damage Assessment** toolbar button from the Damage Assessments window.

The Damage Assessment window displays the following fields and buttons:

- **Event #** is the ID of the event associated with this damage assessment. **0** is displayed if an event has not yet been created for this damage assessment. Once event is created, click the Reload button to populate the field with the event ID.
- **Crew** is the crew that performed the damage assessment.
- The **Select Crew** button opens the Select Crew dialog so you can select a crew to associate with this assessment.
- **Mobile #** is the mobile number of the crew that performed the damage assessment.
- **Report Date** is the date and time when damage assessment was performed. Click to use the date picker to set the date.

### Damage Location Section

- **Feeder** is the name of the feeder.
- **Device** is the device alias.
- **Damage location** is the street address where the damage assessment was performed.
- **Company** is the company-level control zone name.
- **Region** is the region-level control zone name.
- **Branch** is the branch-level control zone name.
- **Substation** is the substation-level control zone name.

### Damage Specifics Section

- **Phases Affected** displays a checkmark beside each affected phase.

- **Section Affected** allows you to specify the section affected by the damage. You can select from a list or enter a value manually.
- **Location** allows you to specify the damage location. You can select from a list or enter a value manually.
- The **Load Affected** checkbox indicates whether the damage affects customers. If checked, the damage assessment will generate an outage incident; otherwise, a non-outage incident will be generated. When damage assessment is performed for an existing non-outage event, this checkbox will be unchecked and non-editable.
- The **Street Light Damage Noted** checkbox indicates whether street line damage is reported.
- The **Required Crew Types** indicates the types of crews needed to repair the damage. Check each one that applies.
- The **Damage Type** column in the Damage Specifics table displays all known types of damage.
- The **Accessible** column in the Damage Specifics table displays the number of accessible instances of a particular type of damage. Enter a value for each applicable damage type. When you modify a row, its background changes to green.
- The **Inaccessible** column in the Damage Specifics table displays the number of inaccessible instances of the particular type of damage. Enter a value for each applicable damage type. When you modify a row, its background changes to green.
- **Comments** contains any remarks associated with the damage specifics.

### Required Material Section

- The **Add Required Part** button opens the Add Required Part dialog so you can select a part and specify a quantity.
- The **Remove Required Part** button allows you to mark a row in the Required Material list for removal. Rows marked for removal display a red background.
- **Part ID** contains the IDs of parts required to repair the damage.
- **Part Name** contains the names of parts required to repair the damage.
- **Quantity** displays the quantity of the specified part.
- **Comments** displays remarks associated with the required material.
- The status bar displays the damage assessment status (active/completed) and the estimated time to repair the reported damage. This is calculated from the information entered into the Damage Specifics table.

### Toolbar Buttons

- The **Reload** toolbar button reloads the currently displayed damage assessment.
- The **Save** toolbar button saves the damage assessment information.
- The **Complete** toolbar button completes the damage assessment. When a damage assessment record is completed, its status changes to inactive and its symbol is removed from the Viewer. Completed damage assessments are not considered when estimated time to repair is calculated for the event.

## Working with AMI Requests

This section describes how to work with AMI requests. It includes the following topics:

- **Displaying the AMI Requests List**
- **Creating AMI Requests for Service Outages**
- **Creating AMI Requests for Device Outages**
- **Creating an AMI Request Without an Outage**
- **Completing AMI Requests**
- **Canceling AMI Requests**
- **Re-submitting AMI Requests**

### Displaying the AMI Requests List

To display the complete AMI Requests list, select **AMI Requests List...** from the Web Workspace Tools menu.

**Note:** the AMI Requests list only displays manually generated pings rather than a historical list of autopings.

To display the AMI Requests for a particular event, select the event in the Work Agenda, then select **Show AMI Requests...** from the Actions menu.

The AMI Requests List displays the following fields and buttons:

- The **Request #** column is the system-generated index of the request.
- The **[Device]** column is the start device.
- The **Feeder** column is the device's feeder.
- The **Substation** column is the device's substation.
- The **Request Date** column is the date the ping was requested.
- The **Who Requested** column displays the login user name that initiated the request.
- The **Event #** column is the outage event (or 0 if N/A).
- The **# Queried** column is the number of meters pinged.
- The **# Responded** is the total number of responses received to date.
- The **# Off** column is the number of deenergized responses received.
- The **Status** column displays ACT=active, CMP=completed, CNL=canceled.
- The **Complete Date** column displays the date completed.
- The **Who Completed** column displays the login user name that completed the request.
- The **Show Event** button navigates back to the Active Trouble Events List page for the selected row's event.
- The **Resubmit** button resubmits (re-pings) the AMI request.
- The **Complete** button completes the ping request.
- The **Cancel** button cancels the ping request and takes no further action.

### Creating AMI Requests

This section includes the following topics:

- **Creating AMI Requests for Service Outages**
- **Creating AMI Requests for Device Outages**

- **Creating an AMI Request Without an Outage**

### Creating AMI Requests for Service Outages

To create an AMI request for an existing service outage, follow these steps:

1. Select an existing PSO event in the Work Agenda, then select **AMI Confirm...** from the Actions menu. The AMI Query Type dialog is displayed.  
  
**Note:** You can also bring up this dialog by selecting **AMI Confirm...** from the Trouble Info window.
2. Select the AMI query type (either Simple Query or Complex Query), and click **OK**. A new AMI request is created for the meter affected by the selected event.

**Notes:** If you attempt to create an AMI request for a customer that is part of an active AMI request, the AMI Rejected Meters dialog is displayed. This dialog lists the customer information associated with the meter that was rejected. Click **OK** to continue.

### Creating AMI Requests for Device Outages

To create an AMI request for an existing device outage, follow these steps:

1. Select an existing device outage in Work Agenda.
2. Select **AMI Confirm...** from the Actions menu in Work Agenda. The Trouble Info tool is displayed, showing information about customers affected by the selected event.
3. Select customers whose meters should be pinged.
4. Select **AMI Confirm...** from the Actions menu in Trouble Info. The AMI Query Type dialog is displayed.
5. Select the AMI query type and click **OK**. A new AMI request is created for the selected meters.

**Note:** If you attempt to create an AMI request for a customer that is part of an active AMI request, the AMI Rejected Meters dialog is displayed. This dialog lists the customer information associated with the meter that was rejected. Click **OK** to continue.

### Creating an AMI Request Without an Outage

To create an AMI request without an existing outage, follow these steps:

1. Double-click on a device in Viewer to bring up Control Tool.
2. Click **AMI Customer List...** in Control Tool. The Trouble Info tool is displayed, showing information about AMI-enabled customers for the selected event.
3. Select customers whose meters should be pinged.
4. Select **AMI Confirm...** from the Actions menu in Trouble Info. The AMI Query Type dialog is displayed.
5. Select the AMI query type and click **OK**. A new AMI request is created for the selected meters.

**Note:** If you attempt to create an AMI request for a customer that is part of an active AMI request, the AMI Rejected Meters dialog is displayed. This dialog lists the customer information associated with the meter that was rejected. Click **OK** to continue.

### Completing AMI Requests

To complete an AMI request, select a row on the AMI Requests list and click the **Complete** button. The options presented to you depend on the status of the original event.

## Canceling AMI Requests

To cancel AMI requests, select one or more rows on the AMI Request list and click the **Cancel** button. The canceled AMI requests disappear from the list of active AMI requests.

## Re-submitting AMI Requests

To resubmit active AMI requests, select one or more rows on the AMI Request list and click the **Resubmit** button. A confirmation window appears, asking whether you want to cancel the active request before submitting the new request. Click **Yes** to confirm.

## Updating the ERT for Selected Events

You can set the estimated restoration time for one or more events are selected in Work Agenda.

**Note:** Updating the ERT from the Work Agenda update is not allowed for the following event types:

- Non-Outages
- Planned Outages
- Switching Jobs
- Notify Alarms
- Critical Meets
- Future Meets
- Real Momentary Outages
- Probable Momentary Outages
- Fault Current Events

If you select an event for which an ERT is not applicable or should not be modified, the system will not update that event's ERT but will update the ERT for all other eligible events selected.

To set the ERT for selected events, follow these steps:

1. From the Work Agenda events list, select all the events for which you want to update the ERT.
2. Select **Update ERT(s)...** from the Actions menu. The Update ERT dialog opens.
3. Enter the new ERT using the calendar tool.
4. Click the **Set ERT** button. The Update ERT dialog closes, and the new ERT value is displayed for the selected events in the Work Agenda list.

## Clearing the ERT

To clear the ERT for events selected in Web Work Agenda, follow these steps:

1. Selects one or more events in Web Work Agenda.
2. Select **Update ERT(s)...** from the Actions menu. The Update ERT dialog opens.
3. Click the **Clear ERT** button. The Update ERT dialog closes, and the ERT values for the selected events are cleared in the Work Agenda list.

## Setting the System-Wide Estimated Restoration Time

Use this procedure to view and modify the system-wide default ERT value. The system-wide ERT is used for all events; it overrides any default ERTs defined at the control zone/device class level in the Configuration Assistant.

To set the system-wide default, follow these steps:

1. Select **System-Wide Default ERT...** from the Web Work Agenda Actions menu. The System-Wide Default ERT dialog opens.
2. Enter a new value in the New System-Wide ERT field, using the calendar tool.

**Note:** Only future dates are allowed.

3. Click the **Set ERT** button. The dialog closes and the specified ERT becomes the default for any new events for which no specific default is specified. All not completed events with an Est Src value of I or N in the Work Agenda will have their ERT values reset to the system-wide default ERT value.

**Note:** This action causes a full re-examination of all events currently in the system; thus, it is advised to use it sparingly when there are a large number of events present.

## Clearing the System-Wide Estimated Restoration Time

Use this procedure to clear the system-wide default ERT value so that all events will use the default values specified for their control zone and device class combination, as defined in the Configuration Assistant. (See **Adding a Device/Zone-Based Default Restoration Time** on page 17-24.)

**Note:** If you clear the system-wide default ERT and no default ERT has been defined that matches the control zone/device class of an event, the event will not be assigned a default ERT. The ERT will remain empty for the event unless you manually change it.

To clear the system-wide default, follow these steps:

1. Select **System-Wide Default ERT...** from the Web Work Agenda Actions menu. The System-Wide Default ERT dialog opens.
2. Click the **Clear ERT** button. The dialog closes and the previously specified ERT is no longer used as the default for any new events. The ERT for an event will default to the value defined for its control zone and device class.

**Note:** This action causes a full re-examination of all events currently in the system; thus, it is advised to use it sparingly when there are a large number of events present.


## Using the Event Log

The Event Log displays a list of all actions taken for an event and displays the Operations Event Notes for the event. You cannot edit existing actions, but you can add a new note.





To display the Event Log for a particular event, select a row in the Work Agenda list and select **Event Log...** from the Actions menu. The Event Log opens, displaying all log entries for this event. The Operations Event Notes field is populated with the comments for this event.


The Event Log displays the following menu and toolbar options:

### File Menu -

Menu Option	Description	Toolbar Icon
<b>Print...</b>	Print the Event Log.	
<b>Exit</b>	Closes the Event Log window.	--

### Actions Menu -

Menu Option	Description	Toolbar Icon
<b>Load Action Steps</b>	Load the action steps for the event listed in the <b>Event #</b> field.	
<b>Clear</b>	Clears current event information from the window.	
<b>View...</b>	Focuses the Viewer on the device associated with the event.	
<b>Event Details</b>	Open event information in the Event Details window.	

- The **Event #** field displays the event identifier. This field is editable so that a user can load a different event by entering a number.
- The **Operations Event Notes** field displays the existing Operations Event Notes for the event.
- Add note text in the top field and click the Add (  ) button to add the note.

**Note:** The Event Log table does not automatically refresh, so the new note will be displayed the next time the event is loaded.

- The table displays a list of log entries. For each entry, the following columns are displayed:
  - The **Date/Time** field displays the date/time at which the log entry occurred.
  - The **User** field displays the user that initiated the action.
  - The **Text** field displays a description of the log entry.



## Clear Data and Load Event Log

To display entries for a different event:

1. Use the button or **Actions>Clear** menu option to clear the entire tool.
2. Enter a new event in the Event # field.
3. Click the button or select **Actions>Load Action Steps** to repopulates the table with the action steps for the new event listed in the **Event #** field.

## Managing Crews with Web Trouble

Oracle Utilities Network Management System – Web Trouble allows you to manage crews efficiently. This section describes the various windows and functions that relate to managing crews. It includes the following topics:

- **Crew Actions**
  - **Assigning a Crew**
  - **Placing a Crew En Route Using the Crew Actions Window**
  - **Changing Crew Availability**
  - **Finding the Event a Crew is En Route To**
  - **Activating a Crew and Making a Crew Inactive**
  - **Setting a Crew's Status to On Shift and Setting a Crew's Status to Off Shift**
  - **Deleting a Crew**
  - **Filtering Crew Lists**
- **Crew Makeup**
  - **Creating a New Crew**
  - **Removing Personnel from a Crew**
  - **Removing a Vehicle from a Crew**
  - **Editing a Crew**
- **Crew Info**
  - **Unassigning a Crew**
  - **Placing a Crew En Route to an Assigned Event**
  - **Suspending a Crew**
- **Active Job Info**
  - **Moving a Crew**
  - **Releasing a Crew from an Event**
  - **Updating Event Information**

## Crew Actions

Use the Crew Actions window to view and manage crews. The Crew Actions window opens by default when you login to Oracle Utilities Network Management System Web Workspace. It is displayed below the Web Work Agenda window. You can also display this window by selecting **Crew...** from the Web Workspace Tools menu.

The Crew Actions window displays a **Menu and Toolbar** and provides two views: **Crew List View** and **Crew Icons View**.



From the Crew Actions window, you can perform the following tasks:

- **Assigning a Crew**
- **Placing a Crew En Route Using the Crew Actions Window**
- **Changing Crew Availability**
- **Finding the Event a Crew is En Route To**
- **Transferring a Crew to a Temporary Control Zone**
- **Activating a Crew and Making a Crew Inactive**
- **Setting a Crew's Status to On Shift and Setting a Crew's Status to Off Shift**
- **Deleting a Crew**

### Menu and Toolbar

The Crew Actions window displays a toolbar and menu bar, as described in the following tables.

#### File Menu

Menu Option	Description	Toolbar Icon
New...	Opens the Crew Makeup window, which allows you to define a new crew.	
Delete	Deletes the currently selected crew after prompting for confirmation. This is enabled only if an inactive non-mobile crew is selected.	
Exit	Closes the Crew Actions window.	--



#### View Menu







Menu Option	Description	Toolbar Icon
Icons	Switches to the Icons view if the List view is currently active.	--
List	Switches to List view if Icons view is currently active.	--

## Filter Menu

Menu Option	Description	Toolbar Icon
Shift Status	Filters by shift statuses. The product environment includes the following shift options: <ul style="list-style-type: none"> <li>• All</li> <li>• On Shift</li> <li>• Off shift</li> <li>• Inactive</li> </ul>	--
Job Status	Filters by job statuses. The product environment includes the following job status options: <ul style="list-style-type: none"> <li>• All</li> <li>• Available</li> <li>• Assigned</li> <li>• En Route</li> <li>• Onsite</li> <li>• Suspended</li> <li>• Unavailable</li> </ul>	--
Crew Type	Filters by crew types. The product environment includes the following crew type options: <ul style="list-style-type: none"> <li>• All</li> <li>• Service</li> <li>• Trouble</li> <li>• Tree Crew</li> <li>• Line</li> <li>• Eval</li> </ul>	--
Event Zone	Filters crews by the zone of the event selected in the Work Agenda. The product environment includes the following event zone options: <ul style="list-style-type: none"> <li>• All</li> <li>• Region (Control Zone Hierarchy Level 2)</li> <li>• Branch (Control Zone Hierarchy Level 3)</li> </ul>	--

## Actions Menu

Menu Option	Description	Toolbar Icon
Edit...	Opens the Crew Makeup window, which allows you to edit the currently selected crew. This is enabled only if a non-mobile crew is selected.	
Crew Info...	Opens the Crew Info dialog for the selected crew.	

Menu Option	Description	Toolbar Icon
Switching...	Opens the switch plan to which the selected crew is associated. This is enabled only if a crew is selected and Web Switching Management is licensed for your system. If more than one plan is associated with the crew, a dialog prompts you to select one.	--
View...	Opens Viewer 1, focused on the device where the selected crew is en route or onsite, and selects event in the Work Agenda Event List to which the crew is en route or onsite. This is enabled only if an en route or onsite crew is selected.	
Locate Crew...	Displays the selected crew in the Viewer window at the current coordinates of the crew. This option is available only for AVL crews.	--
Availability...	Opens the Update Crew Availability dialog for the selected crew.	
Assign	Assigns the selected crew to the event currently selected in Work Agenda.	
En Route	Puts the selected crew en route to the event currently selected in Work Agenda. This is enabled only if the selected crew is an on-shift, available, non-mobile crew that is not currently en route or onsite.	
Active Job Info...	Opens the Active Job Info dialog for the selected crew. This is enabled only if an en route or onsite crew is selected.	
Onsite	Puts the selected crew onsite at the event currently selected in the Work Agenda. This is enabled after the crew is en route.	
Toggle Mobile On	Turns off override for a crew that is currently overridden by the Toggle Mobile Off action.	--
Toggle Mobile Off	Overrides the selected crew to act as a non-mobile crew. Enabled if an active off shift mobile crew is selected. Not available to view only users.	--
Activate	Activates the selected crew. This is enabled only if an inactive non-mobile crew is selected.	--
Deactivate	Deactivates the selected crew. This is enabled only if the selected crew is an off-shift, active non-mobile crew that has no assignments.	--
Set On Shift...	Opens a dialog that allows you to enter an on-shift time for the selected crew. This is enabled only if an off-shift active crew is selected.	--
Set Off Shift...	Opens a dialog that allows you to enter an off-shift time. This is enabled only if the selected crew is an on-shift crew that is not en route or onsite.	--

Menu Option	Description	Toolbar Icon
Transfer Zone...	Temporarily transfer the crew to a different control zone.	--
Release Temporary Zone	Return the crew from its temporary control zone assignment back to its original control zone.	--

### Crew List View

The Crew List view on the Crew Actions window displays a list of crews, in table format. The crews that appear in the list are based on the current filter settings. See **Crew Status** on page B-1 for a list of color codes used to indicate crew status.

The Crew List contains the following fields and buttons:

- The **Control Zone** column contains the name of the control zone the crew is assigned to.
- The **Crew ID** column contains a string that identifies the crew.
- The **Crew Type** column contains the type of crew (*e.g.*, Eval, Service, Line, etc.).
- The **Contact** column contains the contact name for the crew.
- The **Crew Size** column contains the number of crew members.
- The **Feeder** column contains the feeder for the device where the crew is en route/onsite.
- The **Device** column contains the name of the device where the crew is en route/onsite.
- The **Est Restore Time** column contains the date and time when the event where the crew is en route/onsite is estimated to be restored.
- The **# Assign** column contains the number of events assigned to the crew.
- The **Hours Worked** column contains the length of time the crew has been active.
- The **Mobile** column indicates whether this is a mobile crew.
- The **Shift Status** field displays the crew's current shift status. Valid statuses are:
  - Inactive
  - Off Shift
  - On Shift
- The **Job Status** field displays the crew's current job status. Valid statuses are:
  - Available
  - En Route
  - Onsite
  - Suspended
  - Unavailable

### Crew Icons View

The Crew Actions window displays buttons to represent the each crew. In this view, use the Actions menu to perform actions on the selected crew icon. As the crew's status changes, a symbol will be added to the button that depicts the current status; see **Event Status Codes** on page A-1 for the symbol icons that correlate to each status. See also **Crew Status** on page B-1 for

a list of color codes that may be used to indicate crew status when cell or row coloring is enabled in the Web Workspace Preferences menu.

## Activating a Crew

You can set a crew to Inactive status to indicate that it is available for work. You can only activate a crew if its current status is Inactive.

To activate a crew, complete these steps:

1. In the Crew Actions window, select the inactive crew you want to activate.
2. Select **Activate** from the Actions menu. (In List view, you can also right-click the crew and then select **Activate** from the pop-up menu.) The status changes to Off Shift.

**Note:** You cannot activate a crew if its Mobile is Yes. You must choose the **Toggle Mobile Off** option on the Actions menu to change the mobile status before activating. The Mobile Flag column displays No (Override), indicating that the crew's mobile status has been manually overridden.

3. You can now set the crew's status to On Shift. See **Setting a Crew's Status to On Shift** on page 2-30.

## Setting a Crew's Status to On Shift

Setting an active crew's status to On Shift indicates that the crew has started working the shift and sets the time the crew sent on shift. You can only set a crew's status to On Shift if its current status is Active.

To put a crew On Shift, follow these steps:

1. In the Crew Actions window, select the active crew you want to put On Shift.
2. Select **Set On Shift...** from the Actions menu. (In List view, you can also right-click the crew and then select **Set On Shift...** from the pop-up menu.) The Set Crew On Shift dialog opens.
3. To set the On Shift time to the current time, click **OK**.  
To specify a different time, click the button and then select the date/time the crew went on shift. Click **OK** to close the dialog. The On Shift Time field is populated with the selected date/time.
4. Click **OK** to set the shift time. The crew's status changes to On Shift.

## Setting a Crew's Status to Off Shift

Setting an active crew's status to Off Shift indicates that the crew has stopped working the shift and sets the time at which the crew went off shift. You can only set a crew's status to Off Shift if its current status is On Shift.

To put a crew Off Shift, follow these steps:

1. In the Crew Actions window, select the On Shift crew you want to put Off Shift.
2. Select **Set Off Shift...** from the Actions menu. (In List view, you can also right-click the crew and then select **Set Off Shift...** from the pop-up menu.) The Set Crew Off Shift dialog opens.
3. To set the Off Shift time to the current time, click **OK**.  
To specify a different time, click the button and then select the date/time the crew went off shift. Click **OK** to close the dialog. The Off Shift Time field is populated with the selected date/time.
4. Click **OK** to set the shift time. The crew's status changes to On Shift.

## Making a Crew Inactive

You can deactivate a crew to indicate that it is not available for work. You can only deactivate a crew if its current status is Active or Off Shift and it has no current assignments.

To deactivate a crew, complete these steps:

1. In the Crew Actions window, select the active or off shift crew you want to deactivate.
2. Select **Deactivate** from the Actions menu. (In List view, you can also right-click the crew and then select **Deactivate** from the pop-up menu.) The status changes to Inactive.

## Deleting a Crew

To delete a crew, complete these steps:

**Note:** You can only delete a crew if it is inactive. You cannot delete a mobile crew, even if the mobile flag has been overridden.

1. If the crew is active, you must first deactivate it (see **Making a Crew Inactive**). If a crew is on shift, you must first set the crew to off shift (see **Setting a Crew's Status to Off Shift**) and then deactivate it before you can delete it.
2. Select the crew in the Crew Actions window.
3. Select **Delete** from the Actions menu. (In List view, you can also right-click the crew and then select Delete from the pop-up menu.) A dialog prompts you to confirm the deletion.
4. Click **OK**. The crew is deleted from the system.

## Assigning a Crew

You do not have to assign a crew to an event before placing it en route. Assigning merely lines up the event for the crew to work later. To assign a crew to an event, complete these steps:

1. In the Trouble Events list of the Work Agenda, locate the event you want to assign the crew to. Select the row of that event.
2. Select the crew you want to assign the event to in the Crew Actions window.
3. Select **Assign** from the Actions menu. (In List view, you can also right-click the crew and then select **Assign** from the pop-up menu.) The event information is automatically entered into the Crew Info window for the crew.

**Note:** You can assign multiple events to a single crew. You can also assign multiple crews to a single event.

## Placing a Crew En Route Using the Crew Actions Window

To place a crew en route to an event, complete these steps:

**Note:** You can only place a crew en route to an event if the crew is an on-shift, available, non-mobile crew that is not currently en route or onsite to an event.

1. In the Trouble Events list of the Work Agenda, locate the event you want to place the crew en route to. Select the row of that event.
2. Select the crew you want to place en route in the Crew Actions window.
3. Select **En Route** from the Actions menu. (In List view, you can also right-click the crew and then select **En Route** from the pop-up menu.) The icon for the crew turns green, and the event information is automatically entered into the Crew Info and Active Job Info windows for the crew.

**Note:** You can place multiple crews en route to a single event.

## Changing Crew Availability

Making a crew available/unavailable is different from making it active/inactive. When a crew is inactive (*e.g.*, finished working for the day), the crew does not appear in the Crew Actions window. When a crew is unavailable, (*e.g.*, at lunch), it appears in the Crew Actions window (in yellow). You can assign an unavailable crew, but you cannot place it en route. See **Activating a Crew** and **Making a Crew Inactive** for more information on active/inactive crews.

To change a crew's availability, complete these steps:

1. Select the crew you want to change in the Crew Actions window. You cannot change an en route/onsite crew.
2. Select **Availability...** from the Actions menu. (In List view, you can also right-click the crew and then select **Availability...** from the pop-up menu.) The Update Crew Availability dialog box opens.
3. Click on the **Available** button to make the crew available or the **Unavailable** to make it unavailable.
4. If you are making an available crew unavailable, click in the Description field and type a brief reason for the change (*e.g.*, on break).
5. Click **OK**. The crew icon changes to yellow.

**Note:** You can assign events to both available and unavailable crews.

## Finding the Event a Crew is En Route To

To find the event a crew is en route to, select the crew in the Crew Actions window and then select the **View** toolbar button or select **View...** from the Actions menu. The event row is highlighted in the Work Agenda Trouble Events list, and Viewer 1 focuses on the device associated with the en route event.

**Note:** The Work Agenda event row will only be highlighted if the Work Agenda window is open and the event is on the list you currently have displayed in the Work Agenda window. The Viewer will only focus on the device if you have the Viewer 1 window open.

## Transferring a Crew to a Temporary Control Zone

To transfer a crew to a temporary control zone, perhaps to offset a crew shortage in the zone, complete these steps:

1. Select the crew to transfer control.
2. Select **Transfer Zone...** from the Actions menu.
3. Select a control zone in the Transfer Crew Zone dialog.
4. Click **OK** to complete the transfer.

## Returning Control of a Transferred Crew

To return control of the crew to their usual control zone, complete these steps:

1. Select the crew from the crew list.
2. Select **Release Temporary Zone** from the Actions menu.

The crew list will update to show that the crew's control zone has reverted to their permanent assignment.



## Filtering Crew Lists

Crews may be filtered in either of the Crew Actions views (*i.e.*, List or Icons). Filters may be applied in any of the following ways:

### 1. Filter Menu Options

- Choose any combination of options from the Shift Status, Job Status, and Crew Type to view only those crews meeting the criteria.

### 2. List View Dynamic Filtering

- Enter filter criteria in the List View Dynamic Filter field at the top of each column in the crew table.

### 3. Filter by Work Agenda Event Criteria

- Choose a filter from the Filter>Event Zone sub-menu (*e.g.*, Branch)
- Select one or more events in the Work Agenda that are in a control zone.
- The Crew List will display only those crews assigned to the control zone.

**Note:** if you select multiple rows in the Work Agenda that cross multiple control zones, the Event Zone filter will be removed from the Crew List or Crew Icons views. Once you select a single row or rows with events in the same control zone, the filter will be re-enabled automatically.

## Crew Makeup

The Crew Makeup window allows you to perform the following tasks:

- **Creating a New Crew**
- **Removing Personnel from a Crew**
- **Removing a Vehicle from a Crew**
- **Editing a Crew**

To open the Crew Makeup window, select **New...** or **Edit...** from the File menu in the Crew Actions window or click either the **New...** or **Edit...** button in the Crew Actions window.

The Crew Makeup window displays the following fields and buttons:

- The **Crew ID** field displays the alphanumeric ID that identifies the crew.
- The **Mobile #** field displays the mobile telephone or radio number.
- The **Pager #** field displays the pager number.
- The **Contact** field displays the Name of the contact person for the crew.
- The **Crew Size** field displays the Number of members of the crew. The crew size is initially set to zero.
- The **Type** drop-down allows you to select the type of crew (*e.g.*, Line, Eval, Trouble).
- The **Temp/Perm** drop-down allows you to define the crew as either temporary or permanent. When a crew is set to temporary, you would normally delete it when it is deactivated.
- The **Control Zone** field displays the control zone that the crew is assigned to. When you click the **Edit...** button, a Control Zone dialog box opens letting you assign the crew to the selected control zone.
- The **Personnel** list displays the name and job title of each crew member. You can add crew members by clicking the **Add...** or **Select Personnel...** buttons. You can remove a crew member by selecting their row in the Personnel table and clicking the **Remove** button.

- The **Vehicles/Equipment** list displays the vehicles or equipment assigned to the crew. You can add vehicles or equipment by clicking the **Add...** or **Select Personnel...** buttons. You can remove a vehicle or piece of equipment by selecting the item and clicking the **Remove** button.

#### Buttons

- The **Edit...** button opens the Control Zones dialog box, allowing you to select the Control Zone the crew will be assigned to.
- The **Add...** (Personnel) button opens the Add Personnel dialog box, allowing you to enter a crew member's name and select their job type.
- The **Select Personnel...** button opens the Select Personnel dialog box, allowing you to select from a pre-defined list of personnel.
- The **Remove...** (Personnel) button removes the selected individual from the personnel list.
- The **Add...** (Vehicles/Equipment) button opens the Add Vehicle/Equipment dialog box, allowing you to assign vehicles to the crew.
- The **Select Vehicles/Equipment...** button opens the Select Vehicles/Equipment dialog box, allowing you to select from a pre-defined list of vehicles/equipment.
- The **Remove...** (Vehicles/Equipment) button removes the selected vehicle from the Vehicles/Equipment list.
- The **OK** button saves the crew changes and closes Crew Makeup.
- The **Cancel** button closes Crew Makeup without saving any changes.

### Creating a New Crew

To create a new crew, complete these steps:

1. Open the Crew Makeup window either by selecting **New...** from the File menu in Crew Actions or by clicking the **New...** button in Crew Actions.
2. Enter the Crew ID, mobile and pager numbers, and contact.
3. Select the crew type and temporary or permanent from the drop-down lists.
4. Click the **Edit...** button to open the Control Zone dialog box. Select a control zone and click **OK**.
5. Click the **Add...** (Personnel) button to open the Add Personnel dialog box. Enter a crew member's name and select their job title, then click **OK**.

Or,

Click the **Select Personnel...** button to open the Select Personnel dialog box. Select one or more rows from the Select Personnel dialog (using the Control and/or Shift keys), then click **OK**.

6. Repeat the previous step until all crew members are added.
7. Click on the **Add...** (Vehicles/Equipment) button to open the Add Vehicle/Equipment dialog box. Select the vehicle type, and then click **OK**.

Or,

Click the **Select Vehicles/Equipment...** button to open the Select Vehicles/Equipment dialog box. Select one or more rows from the Select Vehicles/Equipment dialog (using the Control and/or Shift keys), then click **OK**.

8. Repeat the previous step until all vehicles are added.
9. Click **OK** on the Crew Makeup dialog to create the crew.

## Removing Personnel from a Crew

To remove an individual from a crew you have open in Crew Makeup, select his or her name in the Personnel list and click **Remove**. The name disappears from the Personnel list.

## Removing a Vehicle from a Crew

To remove a vehicle from a crew you have open in Crew Makeup, select the vehicle from the Vehicles/Equipment list and click **Remove**. The vehicle disappears from the Vehicles/Equipment list.

## Editing a Crew

To edit a crew, complete these steps:

1. Open the Crew Makeup window either by selecting **Edit...** from the File menu or by clicking the **Edit** toolbar button in the Crew Actions window.
2. Make the changes to the crew.
3. Click **OK** on the Crew Makeup dialog to save the changes.

## Crew Info

The Crew Info window displays detailed crew information not shown in Crew Actions window. It allows you to unassign a crew or access the Active Job Info window to place a crew en route to any of its assigned events.

Crew Info topics include:

- **Using the Crew Info Window**
- **Unassigning a Crew**
- **Placing a Crew En Route to an Assigned Event**

## Using the Crew Info Window

To open the Crew Info window, do the following:

1. From the Crew Actions window List view, select the row of the crew you want to view.

From the Crew Actions window Icons view, select the icon of the crew you want to view.

2. Click on the **Crew Info...** button or select **Crew Info...** from the Actions menu.

The Crew Info window contains the following fields and buttons:

- The **Crew ID** field displays the string that identifies the crew.
- The **Mobile #** field displays the crew's mobile phone number.
- The **Pager #** field displays the crew's pager number.
- The **Contact** field displays the name of the crew's contact person.
- The **Type** field displays the type of crew (*e.g.*, Eval, Service, Line, etc.).
- The **Temp/Perm** field displays whether the crew is a temporary crew or a permanent crew.
- The **Control Zone** field displays the control zone the crew is assigned to.
- The **Status** field displays the crew's current status. Valid statuses are:
  - Inactive
  - Off Shift
  - On Shift

- The **Mobile Flag** field indicates whether this is a mobile crew.
- The **Out of Range** field indicates whether the crew is currently out of range (no connectivity).

### Personnel Section

- The **Name** column displays the names of all the crew members.
- The **Job Title** column displays the job titles of all crew members.
- The **Empl ID** column displays the employee ID of all crew members.

### Vehicles/Equipment Section

- The **Type** field displays the vehicle types assigned to the crew.
- The **Vehicle ID** column displays the ID of all vehicles assigned to the crew.

### Active Job Section

- The **Event #** field displays the event number of the event where the crew is currently en route/onsite, if any.
- The **Feeder** number displays the name of the feeder for the device where the crew is currently en route/onsite, if any.
- The **Est Restore Time** field displays the date and time when the event to which the crew is en route/onsite is estimated to be restored.
- The **Device** field displays the name of the device related to the event.

### Current Assignment Section

- The **Event #** column contains the event number of the event the crew is assigned to.
- The **Assign Time** column contains the time the crew was assigned to the event.
- The **Feeder** column contains the name of the feeder involved in the event.
- The **Device** column contains the name of the device related to the event.
- The **# Calls** column contains the number of customer calls received for the event.
- The **# Out** column contains the estimated number of customers experiencing an outage for the event.
- The **Suspended** column indicates whether the assignment was suspended.

### Context Menu

- The **Drop Assignment** context menu option removes the selected event from the list of crew assignments.
- The **Place En Route** context menu option opens the Active Job Info window for you to place the crew en route to an event on the assigned list. You must select an event on the assigned list before you click this button.

### Unassigning a Crew

To drop an assignment from a crew, complete these steps:

1. In the Crew Information window, select the event from the Current Assignments table. The buttons at the bottom of the window become enabled.
2. Click the **Drop Assignment** button. A message box opens asking if you are sure you want to remove the assignment.
3. Click **OK**.
  - The crew is unassigned from the event.

- The event is removed from the list of crew assignments.
- The crew button/crew row changes to white (if the crew is not en route/onsite, unavailable, or assigned to another event).

## Placing a Crew En Route to an Assigned Event

If a crew has been assigned to an event, you can place the crew en route to the event using the Crew Info window.

To place the crew en route to the assigned event, complete these steps:

1. In the Crew Information window, select the event from the Current Assignments table. The buttons at the bottom of the window become enabled.
2. Click the **Place En Route** button. The Active Job Info window opens and the crew is placed en route to the event.

## Active Job Info

The Active Job Info window provides basic crew information, as well as information for the event where they are en route to/onsite at. It allows you to move and release crews. You can also use the Active Job Info window to record that a crew has arrived onsite, enter an estimated restoration time, and add an operations event note.

This section includes the following topics:

- **Using the Active Job Info Window**
- **Updating Event Information**
- **Moving a Crew**
- **Releasing a Crew from an Event**
- **Suspending a Crew**

## Using the Active Job Info Window

You can open the Active Job Info window either from the Crew Actions window or while placing a crew en route from the Crew Info window.

To open the Active Job Info window from Crew Actions, complete these steps:

1. In the Crew Actions window, select the en route/onsite crew you want to view active job information about.
2. Select **Active Job Info...** from the Actions menu. (From the List view, you can also right-click the crew and select **Active Job Info...** from the pop-up menu.) The Active Job Info window opens.

To open the Active Job Info window from Crew Info, complete these steps:

1. In the Crew Info window, select the row of the assigned event you want to place the crew en route to.
2. Click on the **Place En Route** button. The Active Job Info window opens.

The Active Job Info window displays the following fields and buttons:

- The **Crew ID** field displays the string that identifies the crew.
- The **Contact** field displays the name of the crew's contact person.
- The **Event #** field displays the event number of the event where the crew is en route/onsite.
- The **Feeder** number displays the name of the feeder for the device where the crew is en route/onsite.

- The **Device** field displays the name of the device related to the event.
- The **Not Onsite** drop-down menu is a toggle for you to designate whether the crew has arrived onsite yet or not. The field to the right of the drop-down is editable and populates with the current time when you toggle the crew to **Onsite**. You may use the calendar button to the right of the date/time field to specify a different time.
- The **Suspend Crew** checkbox indicates whether the crew is suspended. To suspend this crew, click the checkbox. The field to the right of the checkbox is editable and populates with the current time when you check this box. You may use the calendar button to specify a different time.
- The **Est Time to Restore (HH:MM)** field allows you to enter the estimated amount of time (in hours and minutes) for the event to be restored. If you enter a value here (to the left of the Update Time button) and then click the **Update Time** button, the system updates the Est Time to Restore (displayed to the right of the button) based on the value you entered. You can also enter the Est Time to Restore field directly if you prefer.
- The **Operations Event Note** field allows you to enter notes about the event.

#### Buttons

- The **OK** button saves the changes you have made and closes the Active Job Info window.
- The **Move Crew...** button opens the Choose Work location dialog box where you enter the location you want to move the crew to by selecting a device in the Viewer.
- The **Release Crew** button releases the crew from the event and closes the Active Job Info window.
- The **Cancel** button closes the Active Job Info window without saving any changes to the estimated restore time or Operations Event.

**Note:** If you moved the crew, the change is still saved.

## Updating Event Information

To update event information, complete these steps:

1. Open the Active Job Info window by selecting an en route/onsite crew in Crew Actions and then selecting **Active Job Info...** from the Actions menu.
2. To update the Estimated Restore Date or time, enter the Estimated Time to Restore and click the **Update Time** button. The Est Restore Date and time will change accordingly. You can also directly edit the estimated restore date and time field.
3. You can add event notes in the Operations Event Notes field.
4. Click **OK**. The Active Job Info window closes and your changes are saved.

## Moving a Crew

Moving a crew does not change the event the crew is en route to/onsite at; rather, it moves the crew to another device location and keeps it associated with the same event. By default, Oracle Utilities Network Management System locates a crew at the predicted or confirmed clearing device so that graphically the crew appears to be at the same location as the outage symbol in the Viewer. In some cases, the crew may actually have to work at a location different from the clearing device. It is not required or necessary to move the crew, but moving the crew to the actual device location is helpful in keeping more accurate track of what is going on in the field.

To move a crew, complete these steps:

1. Open the Active Job Info window for the crew you want to move by selecting the crew in the Crew Actions window and then selecting **Active Job Info...** from the Actions menu.
2. Click the **Move Crew...** button. The Choose Work location dialog box opens.

3. Select the new device location in the Viewer window, or select an event in from the Trouble Events list in the Work Agenda that has the same device as the one where the crew is now working.
4. Click **OK**. The crew symbol moves on the Viewer map, and the crew's Device updates in the Active Job Info, Crew Info, and Crew Actions windows. The crew remains en route to/onsite at that same event.

## Releasing a Crew from an Event

To release a crew from an en route/onsite event, complete these steps:

1. Open the Active Job Info window for the crew you want to release by selecting the crew in the Crew Actions window and then selecting **Active Job Info...** from the Actions menu.
2. Click the **Release Crew** button. The following occurs:
  - The crew is released from the event.
  - The crew's active job information is removed from the Crew Info window.
  - The crew button/row changes to white (if the crew is not assigned to another event).
  - The Active Job Info window closes.

## Suspending a Crew

You can suspend a crew that is currently en route or on site to an event. Suspending the crew indicates that the crew is not able to complete the work at this time and is expected to resume work on the assignment at a later time.

To suspend a crew from an en route/onsite event, complete these steps:

1. Open the Active Job Info window for the crew you want to release by selecting the crew in the Crew Actions window and then selecting **Active Job Info...** from the Actions menu.
2. Click the **Suspend** checkbox. The suspend date and time defaults to the current date and time. To specify a different date and time, click the calendar icon and then select the date and time the crew was suspended.

The following occurs:

- The Active Job Info window closes.
- The crew button in the Icons view and the crew row in the List view change to the Suspended color (orange, by default).
- The Current Assignments table in the Crew Info window displays Yes in the Suspended column for this assignment.

## Using Drag and Drop

Oracle Utilities Network Management System Web Workspace supports drag and drop between Crew Actions and the Viewer, as well as between the Viewers or within the Viewer itself.

## Placing a Crew En Route

You can place a crew en route to a device in the Viewer either by dragging a crew icon from the Crew Actions window to the affected device in the Viewer, or by dragging a crew symbol on another device already in a Viewer to the affected device.

**Note:** You can cancel the in-progress dispatch or move of a crew by pressing the <Esc> key on your keyboard, or simply dragging the crew outside the Viewer and then releasing the mouse button.

## Placing a Crew En Route from Crew Actions Window

To place a crew en route from the Crew Actions window using drag and drop, complete these steps:

1. Focus the Viewer on the device that has the event you wish to place the crew en route to.
2. In the Crew Actions window, click on an undischarged, available crew and drag your cursor into the Viewer window, positioning it over the device associated with the event you wish to place the crew en route to.
3. When you see the desired device highlighted in the Viewer, release the mouse button.
  - If multiple events are on the device, a dialog prompts you to specify which event the crew should be placed en route to. Select the appropriate event.
  - The crew symbol appears at the device. The Crew Actions and Work Agenda windows update to indicate that the crew is now en route to the event.

## Placing a Crew En Route from the Viewer

To place a crew en route from the Viewer using drag and drop, complete these steps:

1. Focus the Viewer such that you can see both the symbol of the crew you wish to re-dispatch and the event you wish to re-dispatch the crew to. Alternatively, you can open two Viewers and focus one Viewer on the crew's current location, and the other Viewer on the new location.
2. In the Viewer window, click and drag the crew symbol to the device that has the event you wish to place the crew en route to.
3. When you see the device highlighted in the Viewer, release the mouse button.
  - If multiple events are on the device, a dialog prompts you to specify which event the crew should be placed en route to. Select the appropriate event.
  - The crew symbol appears at the device. The crew is released from its previous event and placed en route to the new event. The Crew Actions and Work Agenda windows update to indicate that the crew is now en route to the new event and no crew is en route to the old event.

## Moving a Crew with Drag and Drop

Moving a crew does not change the event the crew is en route to, rather, it moves the crew to another device location and keeps it associated with the same event. By default, Oracle Utilities Network Management System locates a crew at the predicted or confirmed clearing device so that graphically the crew appears to be at the same location as the outage symbol in the Viewer. In some cases, the crew may actually have to work at a location different from the clearing device. You are not required to move the crew to the actual device location, but moving the crew can help you keep more accurate track of what is going on in the field.

## Moving a Crew from the Crew Actions Window

To move a crew from the Crew Actions window using drag and drop, complete these steps:

1. Focus the Viewer on the device you wish to relocate the crew to.
2. In the Crew Actions window, click the en route crew and drag your cursor into the Viewer window, positioning it over the device that has the event you wish to relocate the crew to.
3. When you see the relocation device highlighted in the Viewer, release the mouse button. A confirmation dialog appears.
4. Click **OK** if you wish to complete the move or **Cancel** if you wish to cancel the move.



## Moving a Crew from the Viewer

To move a crew in the Viewer using drag and drop, complete these steps:

1. Focus the Viewer such that you can see both the symbol of the crew you wish to relocate and the device you wish to relocate the crew to. Alternatively, you can open two Viewers and focus one Viewer on the crew's current location, and the other Viewer on the new location.
2. In the Viewer window, click and drag the crew symbol to device that you wish to relocate the crew to.
3. When you see the relocation device highlighted in the Viewer, release the mouse button. A confirmation dialog appears.
4. Click **OK** on the dialog if you wish to complete the move or **Cancel** if you wish to cancel the move.

## Managing Calls with Web Trouble

Oracle Utilities Network Management System – Web Trouble includes windows that help you manage trouble calls. This section describes those windows and how to perform basic call management functions. It includes the following topics:

- **Changing Rule Sets**
- **Using the Trouble Info Window**
- **Viewing Call Info**
- **Ungrouping Calls**
- **Moving Customers to a Different Device**
- **Unassociating/Reassociating a Call from/to a Device**
- **Editing Clues**
- **Creating AMI Requests for Device Outages**

## Changing Rule Sets

Rule sets are a collection of analysis rules that Oracle Utilities Network Management System Trouble Management uses to determine how and when certain devices will be predicted out and how fast a prediction moves upstream. For example, a rule set might cause fuses to be predicted out if three or more service outages are predicted on downstream transformers. Meanwhile, circuit breakers might require five downstream device outages to cause an upstream prediction to them.

You can change the rule set for control zone(s) over which you have authority over using the Authority window.

To change the rule set for a control zone, complete these steps:





1. Select **Authority** from the Tools menu in the Work Agenda. The Authority window opens.
2. Select the row of the control zone you want to change.
3. Click the **Change Rule Set...** button. A dialog box opens.
4. In the Rule Sets Available list, select the rule set you want to change to.
5. Click the **OK** button. The rule set for that control zone is updated. Oracle Utilities Network Management System Trouble Management will begin grouping and prioritizing new trouble calls in that control zone based on the new rule set.

**Note:** You can only change the rule set for one row at a time.

## Using the Trouble Info Window

Oracle Utilities Network Management System Web Trouble displays customer information about trouble events using the Trouble Info window. The Trouble Info window has four views; the view that opens initially depends on where you open the window from.





The table below describes the various Trouble Info views.

View	Description
<b>Callers View</b> (  )	Lists all calls associated with an event.
<b>Customers View</b> (  )	Lists all the customers: <ul style="list-style-type: none"> <li>located on/downstream from a given device, when accessed via the Control Tool</li> <li>affected by a given event, when accessed via the Work Agenda Trouble Event lists</li> </ul>
<b>Supply Points View</b> (  )	Lists all the supply points associated with the event or selected in the Viewer
<b>AMI Customers View</b> (  )	Depending on where it's accessed from, the AMI Customers view lists all the AMI-enabled meters located on/downstream from a given device or affected by a given event.

### Trouble Info Window Features

The Trouble Info window changes dynamically based on the view. The following tables describe the menus and toolbar actions available in the Trouble Info views.

#### File Menu

Menu Option	Description	View
<b>Callers</b> (  )	Changes the Trouble Info window to the <b>Callers View</b> .	All
<b>Customers</b> (  )	Changes the Trouble Info window to the <b>Customers View</b> .	All
<b>Supply Points</b> (  )	Changes the Trouble Info window to the <b>Supply Points View</b> .	All
<b>AMI Customers</b> (  )	Changes the Trouble Info window to the <b>AMI Customers View</b> . If AMI Customers is the currently selected view, the view is refreshed.	All
<b>Print</b>	Opens the Print Preview dialog, allowing you to print the current contents of the current view.	All
<b>Exit</b>	Closes the Trouble Info window.	All





**Sort Menu**








Menu Option	Description	View
Sort Dialog...	Opens the Sort Dialog, which allows you to choose the sort columns and type (i.e., ascending or descending).	All
Default	Sorts the table according to the default settings for the view.	All

**Filter Menu**

Menu Option	Description
Filter Dialog...	Opens the Filter Dialog, which allows you to choose the columns to sort on.
All	The All filter (default) displays all of the rows in the table.
All Critical	The All Critical filter displays all rows whose Critical column is set to 'EMR', 'MED', or 'KEY'.
EMR	The EMR filter displays all rows whose Critical column is set to 'EMR'.
MED	The MED filter displays all rows whose Critical column is set to 'MED'.
KEY	The KEY filter displays all rows whose Critical column is set to 'KEY'.

**Actions Menu**


Menu Option	Description	Views
Refresh (  )	Refreshes the data in the current view.	All
Call Info... (  )	Opens the <b>Call Info Window</b> for the selected call.	Callers
Ungroup (  )	Opens the Ungroup dialog box, allowing you to ungroup the selected call from the event.	Callers
Unassociate (  )	Opens the Unassociate dialog box, allowing you to unassociate the selected call from this device and (optionally) associate it with a new device. See <b>Unassociating a Call from a Device</b> for more information.	Callers

<b>Move Customers...</b> (  )	Opens the Move Customers dialog box, allowing you to move selected customers to a new device. See <b>Moving Customers to a Different Device</b> on page 2-49 for more information.	Callers, Customers
<b>Edit Clues...</b> (  )	Opens the Edit Clues dialog box for the selected call. See <b>Editing Clues</b> for details.	Callers
<b>View</b> (  )	Targets the Viewer on the Supply Point for the selected call.	Supply Points
<b>Remove</b> (  )	Removes the selected device from the event.	Supply Points
<b>Update Event</b> (  )	Updates the event by saving changes, such as removing a device from an event.	Supply Points
<b>AMI Confirm...</b> (  )	Opens the AMI Query Type dialog, allowing you to request meter pings from AMI system for the selected customers, if applicable. See <b>Creating AMI Requests</b> for details.	AMI Customers
<b>AMI History...</b> (  )	Opens the AMI History window.	AMI Customers

### Help Menu

The Help menu launches Trouble Info online help content.

## Callers View

The Trouble Info Callers view lists all calls associated with an event. Open the Callers view by selecting an event in the Work Agenda and clicking the **Trouble Info...** () button.

### Event Information

The Event Information panel contains the following information:

- The **Event #** field displays the number assigned to the event by the system.
- The **Began At** field displays the time the event began.
- The **Feeder** field displays the feeder on which the affected device resides.
- The **Event Device** field displays the name of the device associated with the event.
- The **Device Type** field displays the type of device associated with the event.

### Calls Table

The Calls Table lists all calls associated with an event. The table provides the following information:

- The **Clues** column displays the trouble code clues received for the call.
- The **Device** column displays the name of the customer's service device.
- The **Name** column displays the customer's name.
- The **Telephone** column displays the customer's telephone number.
- The **Date/Time** column displays the date and time of the customer's call.
- The **Critical** column displays the customer type value of the customer.

- The **Cmt** column displays “Y” if the call contains customer comments and “N” if it does not.
- The **Address** column displays the customer’s address.
- The **Account #** field displays the customer’s account number.

### Comments

The Comments table displays all customer comments associated with the event. If there is a comment associated with a call, selecting the call in the Calls Table will highlight the comment in the Comments table. The Comments table contains the following information:


- The **Name** column displays the customer’s name.
- The **Comment** column displays the customer’s comment.

### Callers View Actions

The following actions are available using the Callers View:

- **Viewing Call Info**
- **Ungrouping Calls**
- **Unassociating a Call from a Device**
- **Moving Customers to a Different Device**
- **Editing Clues**


**Ungrouping Calls** - You can ungroup calls that were automatically grouped by the system as a result of trouble analysis rules. For example, you would ungroup a call from an event that is not actually related to the event, but rather should be its own non-groupable event. To ungroup calls, complete these steps:

1. Select the event row in the Work Agenda you want to ungroup and click the **Trouble Info...**  button. The Trouble Info window opens to the Callers view.
2. Select the row in the Calls Table for the call you want to ungroup.
3. Select **Ungroup** from the Actions menu. The Ungroup dialog box opens with the device related to the event populated in the Device field.
4. Click **OK**.
  - In the Work Agenda, the call is ungrouped and a new event row appears in the Trouble Events list with the appropriate device association.
  - In the Work Agenda, the ungrouped call is removed from the # Calls column for the event it was ungrouped from.

**Note:** Events that are manually ungrouped will not be automatically grouped again by the system. However, you can manually group them again.

**Editing Clues** - You can edit the clues associated with a call, which will cause the call’s trouble code to be changed. You can also enter comments that will be appended to the existing call comments.

To edit clues for a call, complete these steps:


1. Select an event in the Work Agenda with at least one call.
2. Select the **Trouble Info**  button. The Trouble Info window opens to the Callers view.
3. Select a row in the Calls Table.

4. Click the **Edit Clues** toolbar button or select **Edit Clues...** from the Action menu. The Edit Clues dialog opens.
5. Use the drop-down boxes to select different clues.
6. Enter remarks in the Comments box, if desired.

**Note:** The Customer Remarks section is view-only.

7. Click **OK**. The system performs a reprediction to see if the event can now be grouped to other events or be grouped to by other events, based on the updated clues. The system also recalculates the dispatch priority and target response time for any event associated with this call.

**Unassociating a Call from a Device** - You can move a customer to a different device if you discover the customer is associated with an incorrect device. To move a customer to a different device, complete these steps:

1. Select an event in the Trouble Events list (in the Work Agenda window) with at least one call.
2. Select the **Trouble Info**  button. The Trouble Info window opens to the Callers view.
3. Select a row in the Calls table and select **Unassociate** from the Actions menu.

## Customers View

Depending on where it's accessed from, the Trouble Info Customers view lists all of the customers located on/downstream from a given device, or all of the customers affected by a given event. Open this view by clicking on the **Customers** button in the Callers view.

The Customers View displays the following fields:

- The **Event #** field displays the number assigned to the event by the system. This field is not displayed if the Customers View is accessed from the **Customer List...** button of the Control Tool.
- The list title displays either how many customers are located on/downstream from a given device or affected by a given event, depending on where the view is accessed from.
- The **Feeder** field displays the feeder on which the associated device resides. This field is not displayed if the Customers View is accessed from the Control Tool's **Customer List...** button.
- The **Event Device** field displays the name of the associated device. This field is not displayed if the Customers View is accessed from the Control Tool's **Customer List...** button.
- The **Device Type** field displays the type of the associated device. This field is not displayed if the Customers View is accessed from the Control Tool's **Customer List...** button.
- The **Device** column displays the name of the customer's service device.
- The **Name** column displays the customer's name.
- The **Telephone** column displays the customer's telephone number.
- The **Critical** column displays the customer type value.
- The **Address** column displays the customer's address.
- The **Account #** column displays the customer's account number.

## Customers View Actions

You can perform the following task from the Customers View:

- **Moving Customers to a Different Device**

## Supply Points View

Depending on where it's accessed from, the Trouble Info Supply Points view lists all of the supply points located downstream from a given device, or all of the supply points associated with a given event. Open this view by clicking on the **Supply Points** toolbar button or selecting **Supply Points** from the File Menu in the Trouble Info Callers or Customers view.

The Supply Points View displays the following fields:

- **Event Information**
  - The **Event #** field displays the number assigned to the event by the system.
  - The **Feeder** field displays the feeder on which the affected device resides.
  - The **Event Device** field displays the name of the device associated with the event.
  - The **Device Type** field displays the type of device associated with the event.
- **Supply Point Summary** displays totals for all supply points. (See below for descriptions of the columns in this section.)
- The table below the Supply Point Summary lists the following information for each supply point.
  - The **Device** column displays the name of the customer's service device.
  - The **# Customers** column displays the sum of all customers attached to the supply point.
  - The **# EMR** column displays the sum of all EMR customers attached to the supply point.
  - The **# MED** column displays the sum of all MED customers attached to the supply point.
  - The **# KEY** column displays the sum of all KEY customers attached to the supply point.
  - The **# Critical Total** column displays the sum of all critical customers attached to the supply point.
  - The **Control Zone** column displays the supply point's control zone name.
  - The **Group** column displays the pending action for the row:
    - TBG – To Be Grouped
    - TBU – To Be Ungrouped
    - FAIL – Action failed

Use the **View** button to view a selected device in the Viewer.

Click the **Remove** button to remove a device from the event.

Click the **Update** button to save changes.

For information about the **Update Event** button, see **Graphical Grouping (Supply Points Mode)** on page 2-13 for more information.

## AMI Customers View

Depending upon where it's accessed from, the Trouble Info - AMI Customers view lists all the AMI-enabled meters located on/downstream from a given device or affected by a given event.

Open this view by clicking on the **AMI Customers** toolbar button or selecting **AMI Customers** from the File Menu in the Trouble Info Callers or Customers view.

### Event Information

Event Information populates the top portion of the AMI Customer View.

- The **Event Information** field displays the number assigned to the event by the system.
- The list title displays how many AMI Customers are located on/downstream from a given device, affected by a given event, or affected on a given device.
- The **Updated** field displays the date and time at which the Customers view was last populated, as this list is not dynamically updated.
- The **Feeder** field displays the feeder on which the associated device resides.
- The **Event Device** field displays the name of the associated device.
- The **Device Type** field displays the type of the associated device.

### Customer Table

The Customer table portion of the AMI Customers View displays information for the individual customers.

- The **Device** column displays the name of the customer's service device.
- The **Phases** column displays the phases of the customer's service device.
- The **Name** column displays the customer's name.
- The **Telephone** column displays the customer's telephone number.
- The **Critical** column displays the customer type value of the customer.
- The **Address** column displays the customer's address.
- The **Account #** column displays the customer's account number.
- The **Meter #** column displays the customer's meter number.
- The **Request #** column displays the index of the last AMI ping request.
- The **Request Date** column displays the date of the last AMI ping request.
- The **Requested By** column displays the login name of the user who made the last AMI ping request.
- The **Completed By** column displays the login name of the user who completed the last AMI ping request.
- The **Received Date** column displays the date of the last AMI reading.
- The **Probability** column displays the probability percentage from the last AMI reading.
- The **Status** column displays the ON/OFF response from the last AMI reading.

### Ping Response Request and Response Behavior

The **AMI Customer** table displays the most recent ping result when the result came after a ping request or a response. In the interval between the ping request and response, the table displays the ping request number and the status is empty. If a status is received after a ping request, or without a ping request, the table displays the status without a ping request number. If the ping was received after the latest unrequested status, the ping request number and the ping status result are displayed.



## Related Information

See **Working with AMI Requests** on page 2-20 for more information.

## Viewing AMI Customers for a Device

To view AMI customers for a particular device:

1. Select a device in Viewer and open the device in the Control Tool.
2. Click the **AMI Customers...** button in the Control Tool. Trouble Info opens, and the AMI Customers table is populated with the customer information for AMI-enabled customers on the selected device.

## Moving Customers to a Different Device

Trouble Info allows you to move customers to a different device if you discover they are associated with an incorrect device. The Move Customers tool is available from both the Callers and Customers views.

To move customers to a different device, complete these steps:

1. Select one or more customers to move from the Customers view

### Notes:

- You can use the Callers view if the customers that you want to move are all also callers.
- To select multiple adjacent customers, click the first customer row and then press the Shift key and click the last customer row.
- To select multiple non-adjacent customers, press the Control key and click each customer row individually.

2. Select **Move Customers...** from the Actions menu. The Move Customers dialog appears.
3. Select a device in the Viewer to move the customers to. The **New Device** field is populated with the device identifier.
4. Click **OK**. The Move Customers dialog closes.

**Note:** If the selected customers were previously moved to a new device, a confirmation dialog (*i.e.*, Overwrite Moved Customers) is displayed. Do one of the following:

- Click **Yes** to continue and overwrite the existing customer move record.
  - Click **Cancel** to cancel your selection and return to the Move Customers dialog to select a different device.
  - Click **No** to abort the move completely.
5. The event is then re-analyzed using the new device information. If it does not repredict into the same event, the # Calls and # Customers for the original event are adjusted. Calls may be grouped into another existing event or a new event will be created.

## Viewing Call Info

Detailed information about a logged call is displayed in the Call Info window. An event (represented by a single row in the Work Agenda) can have multiple calls if the calls have been grouped to one event. The Call Info window may be accessed from the Trouble Info window. You cannot edit the fields in the Call Info window; they are read only.

To open the Call Info window from the Trouble Info Callers view, select the row of the call you want to display and either click on the **Call Info...** button or select **Call Info...** from the Actions menu.

## Call Info Window

The Call Info window displays the following fields and buttons:

- **Account #** displays the customer's account number.
- **Event Status** displays the current status of the event that this call is a part of.
- **Telephone** displays the customer's phone number.
- **Event #** displays the number assigned to the event by the system.
- **Name** displays the customer's name.
- **Clues** displays the short description representation of the Request drop-down menu selections that were entered when the call was logged.
- **Address** displays the customer's address.
- **Reported Start Date** displays the date and time the problem began for the customer.
- **City** displays the customer's city, state and zip code.
- **Call Taker ID** displays the user name of the person who entered the call.
- **Customer Type** displays the customer type value for the customer.
- **Crew ID** displays the name of the crew that has been placed en route to/is onsite at the event, if any.
- **Customer Device** displays the name of the customer's service device.
- **Callback Date** displays the date and time by which the customer has requested a follow up call, if specified.
- **Zone(s)** displays the control zone(s) the customer is located in.
- **Customer Comment** displays any customer comments that were entered at the time the call was logged.

### Buttons

- The **Print** button opens the Print Preview dialog, which allows you to print the currently displayed customer call information.

## Menus

The following table describes the Call Info menus.

- **File Menu**
  - **Print** – Opens up the Print Preview dialog, which allows you to print out the contents of the currently displayed customer call information
  - **Exit** – Closes the Call Info window
- **Help Menu**
  - The Help menu displays the standard Help and About options.

# Chapter 3

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## Web Call Entry

This chapter describes the **Oracle Utilities Network Management System (NMS) Web Call Entry** application. **Web Call Entry** is used to enter and access customer call and event information. The application streamlines data entry and allows access to customer call, event, and dispatch information by personnel in various operations settings. **Web Call Entry** shares a database with other **NMS** applications. This allows you to view certain data that operations personnel and crew supervisors have entered into the system. The event history and call history information for a customer is often helpful when you are handling a new call from a customer reporting a service outage.

This chapter includes the following topics:

- **Logging in to Web Call Entry**
- **Using Web Call Entry**
- **Searching for a Customer**
- **Viewing Call History**
- **Viewing Event History**
- **Entering a Customer Call**
- **Entering a Fuzzy Call**
- **Cancelling a Customer Call**
- **Viewing the Outages Summary**

## Logging in to Web Call Entry

Web Call Entry is accessed using a URL (web address) or as a local application, depending on your site's policy. Your system administrator determines the web address, if applicable. If accessing Web Call Entry from a browser, complete these steps:

To log in to **Web Call Entry**, complete these steps:

1. Depending on how your system was installed, do one of the following:
  - Click the Web Call Entry icon found under the appropriate program group in your Windows Start Menu.
  - Double click the Web Call Entry icon on your desktop.
  - Open a web browser and type the Web Call Entry URL in the browser's Address field.

The Web Call Entry Login window displays.

2. Enter your user name.

3. Enter your password.
4. Click the **Validate** button. The bottom portion of the Web Call Entry Login window sensitizes.
5. Select the appropriate User Type from the drop-down menu.
6. Click the **Login** button. The Web Call Entry main window appears.
7. If this is the first time running an **Oracle Utilities Network Management System** Windows-based product on your PC, you may be prompted to do a one-time download of a Java plug-in. If so, select **Yes** (or Accept or Agree) on all subsequent dialogs until **Web Call Entry** opens.

**Note:** You or your system administrator can add **Web Call Entry** to your Start menu and/or create a shortcut icon on your desktop for quick access to **Web Call Entry**. When you start up **Web Call Entry** for the first time, it will (depending on installation method) ask if you want to install a shortcut in your Start menu and on your desktop.

## Using Web Call Entry

**Web Call Entry** is presented as a single window that is divided into sections based on functionality and type of information displayed. The sections provide functional groupings of features, such as searchability and data display.

The following topics describe **Web Call Entry**:

- **Menu and Toolbar**
- **Field Descriptions**


Related Topics:

- **Searching for a Customer**
- **Viewing Call History**
- **Viewing Event History**
- **Entering a Customer Call**
- **Entering a Fuzzy Call**
- **Cancelling a Customer Call**
- **Viewing the Outages Summary**








## Menu and Toolbar

The **Web Call Entry** menu and toolbar provide access to commonly used functions. Most of the functions in the Actions menu are also available on the toolbar.

### File Menu

Menu Option	Description	Toolbar Icon
Outages Summary...	Opens the Outages Summary window.	

## Actions Menu

Menu Option	Description	Toolbar Icon
<b>Customer Search</b>	Searches for customers based on the search criteria entered into the Searchable Information section. The system displays up to the first 100 customers located in the database that match the criteria.	
<b>Intersection Search</b>	Searches for a street intersection based on one or two street names entered into the Intersection Search section. The order of the street names does not matter for matching purposes.	
<b>Call Search</b>	Searches through previous calls based on the search criteria entered into the Searchable Information section. The system displays up to the first 100 calls located in the database that match the criteria.	
<b>Submit Call</b>	Saves the call details entered into the request sections and clears the form.	
<b>Call History...</b>	Opens <b>Call History</b> , which lists current and historical calls from the customer. This option is disabled if a previous call does not exist.	
<b>Event History...</b>	Opens <b>Event History</b> , which lists current and historical events involving the customer. Note that the customer need not have called to be part of an event. This option is disabled if a previous event does not exist.	
<b>Clear Form</b>	Removes customer, event, and crew information from the fields on the window. Remember to save the call, if desired, before clearing the fields.	

## Options Menu

Menu Option	Description	Toolbar Icon
<b>Set Wild Card Searching</b>	<p>Allows you to set the wild card search option. Wild card searching allows you to enter partial names or numbers in the searchable fields and all matching results will be returned. For example, if you have the wild card searching set to Both, and you enter “anders” into the Name field, the system returns customers named “Anderson”, “Andersen”, and “Sanders”.</p> <ul style="list-style-type: none"> <li>• <b>Before</b> - puts a wild card before the search string</li> <li>• <b>After</b> - puts a wild card following the search string</li> <li>• <b>Both</b> - puts a wild card both before and after the search string</li> </ul>	--

Menu Option	Description	Toolbar Icon
<b>Use Sound Search</b>	Allows you to use the “sounds like” search feature, which displays search results that are phonetically similar to the search criteria. For example, if you enter “Jon Doh”, the system would return customers such as “John Doe.” If you select this search option, Wild Card searching and Exact Match searching options are disabled until this option is toggled off.	--
<b>Use Exact Match Search</b>	Displays search results that exactly match the search criteria. This is the most restrictive search option. Wild Card searching and Sound searching options are disabled until this option is toggled off.	--
<b>Set Max Searching Results</b>	Allows you to set the maximum number of search results returned. If you enter a maximum search result of “50”, up to 50 entries display in the Customer Selection or Call Selection (search results) dialog box. This feature is helpful when using wild card searching. (For performance reasons, the system will not allow the maximum search results to be set above 100.)	--

#### Help Menu

The Help menu displays the standard Help and About options.

#### Logout Menu

Provides the User Logout command to exit **Web Call Entry**.

## Field Descriptions

This section describes the fields and buttons on the Web Call Entry window.

### Searchable Information

The Searchable Information section allows you to enter search criteria to locate information for the customer calling to report a problem or request service. You can execute a search with full or partial data by entering information in any of the searchable fields and then either clicking the **Search** button or selecting Search from the Actions menu. If there is more than one match for the query, results are displayed in a Customer Selection table. From the Customer Selection table, you can select the appropriate record. For more information, see **Searching for a Customer**.

The Searchable Information section displays the following fields:

- The **Call ID** field contains the unique Call ID generated when a call is entered. A successful search on this field will open the Call History window with information from this call.
- The **Account #** field contains the customer account number. Enter all or part of the account number to **search for the customer**.
- The **Telephone** field contains the customer telephone number. Enter all or part of the telephone number to **search for the customer**.
- The **Name** field contains the customer name. Enter all or part of the customer name to search for the customer.
- The **Address** field contains the customer address or the address for the problem location. Enter all or part of the address to search for the customer or problem location.
- The **City** field contains the city, state, and zip code. This is a view-only field that is populated when a search is performed.

## Intersection Search Section

The Intersection Search section allows you to enter one or two street names and see a list of all matching street intersections containing the name(s). This allows the entry of a call that can be associated to the street intersection, which is helpful if someone is reporting a traffic light that is out or a customer has an outage but is not correctly located in the database.

The Intersection Search section displays the following fields:

- The **Street 1** field is required for searches and should just contain the street name with no numeric address part and no suffix such as St, Ln, Rd, S., W., etc. Capitalization does not matter.
- The **Street 2** field is optional for searches and should just contain the street name with no numeric address part and no suffix such as St, Ln, Rd, S., W., etc. Capitalization does not matter.

**Note:** The order of the street names does not matter. If the database has “W 50th ST & BIRCH ST” as the intersection, it still will be found if you enter “Birch” for **Street 1**.

## Additional Customer Information

The Additional Customer Information section displays the following fields:

- The **Account Type** field is a view-only field that indicates the type of customer account (*e.g.*, electric).
- The **Customer Type** field is a view-only field that indicates the type of customer (*e.g.*, critical). If a customer type has not been designated for the customer, this field will have 'STD'.
- The **Customer Device** field is a view-only field that indicates the device name associated with the customer.
- The **ERT to Report** field is used to track the estimated restore times (ERTs) given to a caller. If the customer is part of one or more outages, the **ERT to Report** field will default to the latest of the ERTs for outages affecting that customer. The button on the right opens a calendar dialog from which the reported date and time can be selected.

## Appointment Request

The Appointment Request section allows you to schedule an appointment or record a prior notification requirement for a meet. The Appointment Request section includes the following fields:

- **Type** is a drop-down menu that allows you to select the appointment type:
  - **None**, the default value, signifies that there is not an appointment request for the call.
  - **After** signifies that an appointment is being scheduled within a range after the time given in the Date/Time field. For example, scheduling a meet between 8:00 a.m. and noon would have range of 04:00 and a time beginning at 08:00.
  - **Call Before** is for appointments where there is not a specific time or range, but the customer needs a certain amount of forewarning prior to the appointment. For example, it may be the time required for the customer travel from work to their home for the appointment.

## Callback Request

The Callback Request section allows you to specify a ‘call before’ date/time and an optional callback phone number, or indicate if no callback was requested. The information you enter in these fields is saved to the database and used by other Oracle Utilities Network Management

System applications and possibly other 3<sup>rd</sup> party systems that are interfaced to Oracle Utilities Network Management System.

The Callback Request section includes the following fields:

- **Call Before Date** is a radio button that allows you to indicate that the customer would like to be contacted (called back) when the event is restored. Click on the calendar button to select a date and time after which the callback should not be performed. The date field can be left blank if the customer does not indicate a restriction.
- **No Callback Requested** is a radio button that allows you to indicate that the customer does not want to be called back regarding the event.
- The **Callback Phone** field contains an optional phone number, to be entered if the customer wishes to be called back at a different number (*e.g.*, their cell phone) than the primary phone number on their account.

## Request

The Request section allows you to enter general details provided by the caller. The information you enter in these fields is saved to the database and used by other Oracle Utilities Network Management System applications and possibly other 3<sup>rd</sup> party systems that are interfaced to Oracle Utilities Network Management System.

- **Power** is a drop-down menu that allows you to select the status of the power (*e.g.*, dim lights).
- **Cause** is a drop-down menu that allows you to select the cause (if known) of the event (*e.g.*, tree limb on wire).
- **Description** is a drop-down menu that allows you to select an additional description of the event (*e.g.*, sagging wire).
- **Street Light** is a drop-down menu that allows you to indicate problems with streetlights or traffic lights.
- **Meter** is a drop-down menu that allows you to select an action needed in regard to the meter (*e.g.*, connect).
- **Meet** is a drop-down menu that allows you to indicate whether emergency or other personnel should be met on the scene (*e.g.*, meet fire).
- **Priority** is a drop-down menu that allows you to indicate whether the event is a priority situation (*e.g.*, extreme/life).
- **Other** is a drop-down menu that allows you to cancel previous calls from this customer or enter in “informational” calls when the customer calls back to simply ask for more information about their event.

**Note:** The actual set of drop-down menus may be different at your company.

## Customer Comment

- The **Customer Comment** field allows you to enter a note based on the remarks of the caller.

## Operations Event Note

- The **Operations Event Note** field displays any dispatcher or crew notes that may have been entered into the system, such as waiting for special equipment or for traffic police to secure an area. This field is view-only.

## Event Information

The Event Information section is view-only and populated with information only if one or more active events are associated with the customer. The Event Information table displays information



about each active event associated with the customer. To view the Operations Event Note if there are multiple events, select the desired event from the table.

The Event Information Section displays the following columns:

- The **Event #** column contains the unique number assigned to the event. The event number is also displayed in other Oracle Utilities Network Management System applications in order to track the status of the event.
- The **Event Device** column contains the name of the device associated with the event.
- The **Event Type** column contains a classification of the event. See **Event Type Codes** on page A-4 for a complete list of event type codes and their descriptions.
- The **Start Date** column contains the date and time the event began.
- The **Est Rest Time** column contains the date and time the operations center or the crew predicts the event will be resolved.
- The **Trouble Codes** column contains the trouble codes that were entered when the call was taken (*e.g.*, Sagging wire). See **Event Type Codes** on page A-4 for a complete list of event type codes and their descriptions.
- The **# Cust** column contains the estimated number of customers affected by the event.

## Crew Information

The Crew Information section displays the following information about any crew currently associated with active events.

- The **Event #** column contains the unique number assigned to the event. The event number is also displayed in other Oracle Utilities Network Management System applications in order to track the status of the event.
- The **Crew ID** column contains the identification name or number of the crew.
- The **Assigned Date** column contains the date and time the crew was assigned to the event.
- The **# Assignments** column contains the total number of events to which the crew is assigned.
- The **En Route Date** column contains the date and time the crew was placed en route to the event.
- The **On Site Date** column contains the date and time the crew arrived on site.

## Planned Outages Information

The Planned Outages Information section displays the following information about any upcoming planned outage that the customer will be a part of.

- The **Planned Start** column contains the date and time the planned switching work is scheduled to begin.
- The **Planned Finish** column contains the date and time the planned switching work is scheduled to end.
- The **Office** column contains the office responsible for the switching plan.
- The **Work Location** column contains the street address or specific location for the switching operation.
- The **Description of Work** column contains a general description about what the planned switching work is trying to accomplish.

## Searching for a Customer

When a customer calls in, you can enter the details for the call in Web Call Entry. First you must search for the customer in order to populate the necessary information for submitting the call.

To search for a customer, complete these steps:

1. Verify that you have selected the preferred search option settings. Select the **Options** menu to view the current settings.
2. Enter all or part of the customer's information in the **Searchable Information** fields (*e.g.*, name, telephone number, etc.). Typically you will fill in search information in only one of the fields for a search.
3. Click the **Search** button on the toolbar, or press **Enter**. If a match is found, the customer information is displayed on the Web Call Entry window.
4. If more than one customer matches the search criteria, the Customer Selection dialog box displays the search results display in a table that contains the customer's account number, name, address, city, state, zip code, and telephone number. You can use this information to confirm that you are entering an event for the correct customer.
5. Select the customer from the list and click the **OK** button. The customer's information displays on the main Web Call Entry window.

## Searching for a Customer Using the Call ID

When a customer calls in to follow up on a previous call, you can search for that call in Web Call Entry.

To search for a call using the original call ID, complete these steps:

1. Enter the call ID in the Searchable Information **Call ID** field.
2. Click the **Search** button on the toolbar, or press Enter. If a match is found, the Call History window opens. (See **Viewing Call History** on page 3-9.) Skip to step 5.
3. If more than one call matches your search criteria, the Call Selection dialog box opens. The search results display in a table that contains the call date/time, name, address, city, state, zip code, and telephone number. You can use this information to confirm that you are retrieving the correct call.
4. Select a call from the list and click the **OK** button. The call's information displays on the main Web Call Entry window.
5. Confirm that it is the correct call and click the **Load** button. The Call History window closes and the call information displays in the Web Call Entry window.

## Search for a Call using Caller Information

To search for a call using previous caller information, complete these steps:

1. Verify that you have selected the preferred search option settings. Select the **Options** menu to view the current settings.
2. Enter all or part of the caller's information in the **Searchable Information** fields (*e.g.*, name, telephone number, etc.) Typically you will fill in search information in only one of the fields for a search.
3. Click the **Call Search** button on the toolbar. If a match is found, the call information is displayed.
4. If more than one call matches the search criteria, the Call Selection dialog box opens (see above). The search results display in a table that contains the call date/time, name, address,

city, state, zip code, and telephone number. You can use this information to confirm that you are retrieving the correct call.

5. Select a call and click the **OK** button. The call information displays in the Web Call Entry window.

## Viewing Call History

**Call History** allows you to view a historical record of customer calls. This is important for managing the relationship with customers who are repeat callers. Once you have selected a call from the customer's call history, you can view the details for the call.

**Call History** offers a tabular summary of each call a customer has made that is still in the database. The calls are chronologically ordered by call date, but can be sorted by any of the other columns by clicking on the column header. Click the column header once to sort in one direction (*e.g.*, ascending order), and click a second time to sort in the other direction (*e.g.*, descending order).

You can access **Call History** by clicking the **Call History** button on the toolbar or selecting **Call History...** from the Actions menu.

**Note:** Your system administrator sets up the amount of call history data maintained in the database.

## Call History User Interface

**Call History** displays the following sections:

### Call History

- The **Call Date** column contains the date and time the customer call was entered.
- The **Trouble Codes** column contains the trouble conditions for the event (*e.g.*, out).
- The **Customer Comment** column contains comments from the customer as entered by the call taker, if any.
- The **Active** column is an indicator of whether the call is active. Values are:
  - Y - Yes, call (and associated event) are still active
  - N - No, call (and associated event) are resolved
  - C - Cancelled, customer called back to cancel call
  - E - Cancelled, operator cancelled event via Work Agenda
- The **Reported ERT** column contains the ERT value that was explicitly provided to the customer on that call.
- The **Call ID** column contains the unique ID generated when call is entered into system.

If you select a row in the table, the details for that call are displayed in the window below the table. The call details include customer information, callback request information, event information (*e.g.*, cause), and customer comments. The information on the Call History window is view-only except for the Callback Phone and the Customer Comment area. The fields on the Call Details window generally match the fields on the main Web Call Entry window.

### Call Taker ID

- The **Call Taker ID** field displays the ID of the user who recorded the call.

### Control Zone

- The **Control Zone** field displays the Control Zone where the problem is located.

### Call Information

- The **Reported Start Date** field is a field that indicates when the event was first reported to have started.

### Customer Information

- The **Call ID** field contains the unique Call ID generated when a call is entered.
- The **Account #** field contains the customer account number.
- The **Telephone** field contains the customer telephone number.
- The **Name field** contains the customer name.
- The **Address** field contains the customer address or the address for the problem location.
- The **City** field contains the city, state, and zip code.
- The **Customer Type** field is a field that indicates the type of customer (*e.g.*, critical). If a customer type has not been designated for the customer, this field will have '0'.
- The **Customer Device** field is a field that indicates the device name associated with the customer.

### Appointment Request

The Appointment Request section includes the following fields:

- **Type** is a drop-down menu that allows you to select the appointment type:
  - **None**, the default value, signifies that there is not an appointment request for the call.
  - **After** signifies that an appointment is being scheduled within a range after the time given in the Date/Time field. For example, scheduling a meet between 8:00 a.m. and noon would have range of 04:00 and a time beginning at 08:00.
  - **Call Before** is for appointments where there is not a specific time or range, but the customer needs a certain amount of forewarning prior to the appointment. For example, it may be the time required for the customer travel from work to their home for the appointment.

### Callback Request

- **Call Before Date** is a radio button that indicates that the customer wanted to be contacted (called back) when the event is restored.
- **No Callback Requested** is a radio button that indicates that the customer did not want to be called back regarding the event.
- The **Callback Phone** field contains an optional phone number that was entered if the customer wished to be called back at a different number than the primary phone number on their account.

### Last Callback

- This displays the last **Callback Time** and **Callback Result**.

### Request

- **Power** is a drop-down menu that indicates the status of the power (*e.g.*, dim lights).
- **Cause** is a drop-down menu that indicates the cause (if known) of the event (*e.g.*, tree limb on wire).
- **Description** is a drop-down menu that indicates an additional description of the event (*e.g.*, sagging wire).
- **Street Light** is a drop-down menu that indicates problems with streetlights or traffic lights.

- **Meter** is a drop-down menu that indicates an action needed in regard to the meter (*e.g.*, connect).
- **Meet** is a drop-down menu that indicates whether emergency or other personnel were to be met on the scene (*e.g.*, meet fire).
- **Priority** is a drop-down menu that indicates whether the event is/was a priority situation (*e.g.*, extreme/life).
- **Other** is a drop-down menu that indicates whether or not the call was simply an “informational” one (the call to cancel a previous call doesn't show up in the Call History, so this would never display the value of “Cancel”).

### Customer Comment

- The **Customer Comment** field displays the remarks of the caller, if any.

### Toolbar Buttons

- The **Load** toolbar button loads the main Web Call Entry window with Customer and Event Information based on this call, and closes the Call History window. (Only enabled if search was based on Call ID.)
- The **Save** toolbar button saves any changes to the Callback Phone or Customer Comment fields and closes the Call History window.
- The **Cancel** toolbar button allows you to cancel the selected call.
- The **Close** toolbar button closes the Call History dialog box.
- The **Help** toolbar button displays help for this window.

## Viewing Event History

**Event History** offers a table summary of events related to the customer. The events are chronologically ordered by start date, but can be sorted by any of the other columns by clicking on the column header. You can access **Event History** by clicking the **Event History** button on the toolbar or selecting **Event History...** from the Actions menu.

**Note:** Your system administrator sets up the amount of event history data available.

### Event History Section

- The **Event #** column contains the unique number assigned to the event. The event number is also displayed in other Oracle Utilities Network Management System applications in order to track the status of the event.
- The **Start Date** column contains the date and time the event was reported to have begun. This is typically the same time as when the first call was entered.
- The **End Date** column contains the date and time the event was resolved. If this field is empty, then the event has not been completed in Oracle Utilities Network Management System.
- The **Event Type** column indicates whether the event was an outage or non-outage. (**OUT** - An outage event where some customers were without power, **NON** - A non-outage event, such as street light always on/off.)
- If you select a row in the table, the details for that event are displayed in the window below the table. The event details include the event number, device and feeder information, and event time information. The information on the Event History window is view-only. Many of the fields on the Event History window match the Event Information and other fields on the main Web Call Entry window.

### Event Information Section

- The **Event #** field displays the unique number assigned to the event. The event number is also displayed in other Oracle Utilities Network Management System applications in order to track the status of the event.
- The **Feeder** field displays the feeder associated with the event.
- The **Event Device** field displays the device associated with the event.
- The **Est Cust Affected** field displays the estimated number of customers affected by the event.
- The **First Call At** field displays the date and time the first call was entered.
- The **Event Start Date** field displays the date and time the event was reported to have begun. This is typically the time the first call was entered.
- The **Event Restored At** field displays the date and time the event was resolved. If this field is empty, then the event has not been completed in Oracle Utilities Network Management System.
- The **Remedy** field displays the value from the Event Details Remedy drop-down if it has been populated from Trouble Management or Web Trouble.

### Cause Factors

- The **Scheduled** field displays the value from the Event Details Scheduled drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Utility Error** field displays the value from the Event Details Utility Error drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Other** field displays the value from the Event Details Other drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Foreign Interf.** field indicates any foreign interference associated with the outage.
- The **Vegetation** field displays the value from the Event Details Vegetation drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Defective Equip.** field displays the value from the Event Details Defective Equip. drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Environment** field displays the value from the Event Details Environment drop-down if it has been populated from Trouble Management or Web Trouble.
- The **Weather** field displays the value from the Event Details Weather drop-down if it has been populated from Trouble Management or Web Trouble.

### Operations Cancellation Reason

- The **Operations Cancellation Reason** field displays the reason given for canceling the event if cancelled by operations personnel. Typically done if event was inadvertently entered in the system.

### Operations Cancellation Reason

- The **Operations Event Note** field displays notes entered regarding the event. These notes may include crew remarks and resolution issues.

### Toolbar Buttons

- The **Close** button closes the Event History window.
- The **Help** button displays help for this window.

## Entering a Customer Call

After you have located the information for a customer and have reviewed any call history and event history, you can proceed to enter a call. You enter all call information in the main Web Call Entry window.

To enter a customer call, complete these steps:

1. Search for the customer information. (For details on how to search for customer information, see [Searching for a Customer](#).)
2. If the customer wishes to be called back when the event is complete, click the **Call Before Date** radio button. If part of your business process, and if the customer indicates a restriction, click on the **Calendar** button (at right) to enter the date and time after which the customer no longer wants to be called. If the customer provides a different phone number for the callback, enter it in the Callback Phone field.
3. Select the appropriate options from the drop-down menus in the Request section. These are necessary for operations personnel to understand and quickly resolve the event.
4. In the Customer Comments field, enter any information that the customer provides that will assist the operations personnel or the crew.
5. Save the call by clicking the **Submit Call** button on the toolbar or selecting the Submit Call option from the Actions menu. A popup dialog will display with a Call ID.
6. Provide the Call ID to the customer, and then click the **OK** button to dismiss the dialog.

## Entering an Informational Call

A customer may call back to ask when their power is expected to be restored. If you need to keep track of when estimated restore times (ERTs) are provided to a customer, complete these steps:

1. Search for the customer information. (For details on how to search for customer information, see [Searching for a Customer](#) on page 3-8.)

**Note:** The **ERT to Report** field will default to the latest of the ERTs for outages affecting that customer. If the field is blank, or if a different ERT is given to the customer (*e.g.*, by rounding the listed ERT up to the next half hour), then modify the field to display the actual ERT that the customer is told. Select the button on the right to open a calendar dialog from which the reported date and time can be selected.

2. In the **Web Call Entry** Request section, select the **Informational** option from the **Other** drop-down.
3. Save the call by clicking the **Submit Call** button on the toolbar or selecting the Submit Call option from the Actions menu.

## Entering a Fuzzy Call

Fuzzy calls are calls that are not initially associated with a customer or device. For example, a fuzzy call results when you receive a call from the police reporting that a pole is down at a street intersection. It can later be associated with a specific device.

The search will not match on a specific customer, but will instead display the “fuzzy call” dialog as shown below.

To enter a fuzzy call, complete these steps:

1. Enter the address information (*e.g.*, cross streets). A fuzzy call should have some address information filled in, even if it just an intersection.

2. Click the **Search** toolbar icon or select the **Search** option from the Actions menu. A dialog appears, indicating that there was no match for the search criteria, but the call can be edited or saved.
3. If you know the control zone associated with the trouble location indicated by the caller, click on the **Control Zone Selection** button to the right of the Control Zone field. Select the control zone from the tree display and then click the **OK** button.
4. Click the **Edit Call** button.
5. If the caller wishes to be called back when the event is resolved, click the **Call Before Date** radio button. Then, click on the **Calendar** button (at right) to enter the date and time after which the customer no longer wants to be called. Enter the caller's phone number in the **Callback Phone** field.
6. Select the appropriate options from the drop-down menus in the **Request** section, such as Power, Cause, Description, Street Light, Meter, Meet, Priority, and Other. (See **Callback Request** for details.) These are necessary for operations personnel to understand and quickly resolve the event.
7. In the **Customer Comments** field, enter any information that the caller provides that will assist the operations personnel or the crew.
8. Save the call by clicking the **Submit Call** button on the toolbar or selecting the **Submit Call** option from the Actions menu. **Note:** This button is only enabled if the Address field was filled in when the search was done.  
  
A popup dialog displays the Call ID.
9. Provide the Call ID to the caller, and then click the **OK** button to close the dialog.

## Cancelling a Customer Call

You can cancel a call from the Call History window. This is useful if a customer calls back to indicate that the problem related to the initial call has been resolved. You can cancel fuzzy calls using this procedure.

**Note:** The original call is not removed from the system; rather, its status is changed to C (cancelled) and a new call is created with a status of N, indicating that the original call and its associated event have been resolved.

To cancel a customer call, complete these steps:

1. Search for the customer information. (For details on how to search for customer information, see **Searching for a Customer**.)
2. Click the **Call History** button on the toolbar or select **Call History...** from the Actions menu.
3. Select the call in the Call History list. The Cancel button is enabled.
4. Click the **Cancel** button on the toolbar. The Cancel Call dialog is displayed.
5. Enter the reason for the cancellation, and click **OK**.
6. You can view the original cancelled call and the new call entry in the Call History.

## Cancelling All Calls For a Customer Account

Use this procedure to cancel all calls for a customer account.

1. Search for the customer information. (For details on how to search for customer information, see **Searching for a Customer** on page 3-8.)



1. In the Request section of the main Web Call Entry window, select the Cancel option from the Other drop-down.
1. Save the call by clicking the **Submit Call** button on the toolbar or selecting the Submit Call option from the Actions menu.

**Note:** Fuzzy calls must be cancelled in the Work Agenda. See the previous procedure.

## Viewing the Outages Summary

The **Outages Summary** presents the user with a view-only summary of the total active outage events in the system. The information in the window dynamically updates as new calls come in and as new outages are created and restored. The events are sorted by default on the E/H and # Out values, but can be sorted by any of the other columns by clicking on the column header. You can access the Outages Summary by clicking the **Outages Summary** button on the toolbar or selecting **Outages Summary** from the File menu.

The **Outages Summary** contains two tables. The top table is a summary and the table below it displays a row for each event in the summary table.

The summary table at the top of the Outages Summary window displays the following columns:

- The **Events in View** field displays the number of events currently displayed in the Outages Summary.
- The **Est Cust Out** field displays the number of customers estimated to be affected by the events currently displayed in the Outages Summary.
- The **Calls** field displays the number of calls entered for the events currently displayed in the Outages Summary.
- The **Pri Calls** field displays the number of priority calls entered for the events currently displayed in the Outages Summary.
- The **EMR Cust Out** field displays the number of emergency customers affected by the events currently displayed in the Outages Summary.
- The **MED Cust Out** field displays the number of medical customers affected by the events currently displayed in the Outages Summary.
- The **KEY Cust Out** field displays the number of key customers affected by the events currently displayed in the Outages Summary.
- The **Crews En Route/Onsite** field displays the number of crews en route to/onsite at the events currently displayed in the Outages Summary.

The **Current Outages** table displays the following columns:

- The **E/H** column indicates whether or not the event is an emergency or hazardous condition. An “E” in this column denotes extreme emergency, and an “H” in this column denotes hazardous.
- The **# Out** column contains the number of customers experiencing an outage for the event.
- The **# Crit** column contains the total number of critical customers experiencing an outage for the event.
- The **# Calls** column contains the number of calls received for the event.
- The **Region** column contains the control zone region where the event occurred.
- The **Branch** column contains the control zone branch where the event occurred.
- The **Substation** column contains the control zone substation where the event occurred.

- The **Location** column contains either the address of the first customer that called if the event is a service outage or non-outage or the feeder location of the device if the event is a device outage.
- The **Start Date** column contains the date and time the event began.
- The **Est Restore Date** column contains the estimated restoration time (ERT) for the event.
- The **Est Src** column contains the source of the ERT for the event. The possible source values are:
  - N - none (no ERT)
  - S - Oracle Utilities Network Management System - Storm Management
  - P - Oracle Utilities Network Management System Storm Management “non-published global ERT”
  - O - Oracle Utilities Network Management System Storm Management “onsite ERT” used when the crew is en route or onsite. If the crew is en route, the ERT includes the travel time plus the repair time; if the crew is onsite, the ERT only includes the repair time.
  - G - Oracle Utilities Network Management System Storm Management “published global ERT”
  - C - User-entered (assumed to have been provided by the crew)
  - I - Initial default ERT
- The **Clues** column contains the clue codes for the calls received, if any.
- The **Status** column displays the status assigned to the event. See **Event Status Codes** on page A-1 for a complete list of status codes and descriptions.
- The **Crews** column contains the crew id(s) of the associated crew(s).

The **Operations Event Note** field displays the Operations Event Note for the selected event, if any.

### Buttons

- The **Auto Filter** button allows you to quickly filter the view by the selected cell value.
- The **Auto Filter Off** button turns off any auto filter that has been applied.

### Menus

The following table describes the Outages Summary menus.

Menu	Option	Description
File	Print	Opens up the Print Preview dialog, which allows you to print out the Outages Summary window.
File	Exit	Closes the Outages Summary window.
Filter	Auto Filter	Allows you to quickly filter the view by the selected cell value.
Filter	Auto Filter Off	Turns off any auto filter that has been applied.
Actions	Default Sort	Applies the default sort to the Outages Summary.

Menu	Option	Description
Help	Web Call Entry Help	Opens a help dialog for the current window.
Help	About Web Call Entry	Opens the standard About dialog.



# Chapter 4

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## Web Callbacks

This chapter describes the **Web Callbacks** module functionality. It includes the following topics:

- **Overview**
- **Starting Web Callbacks**
- **The Web Callbacks Window**
- **Assigning Callbacks**
- **Viewing Callback Assignments**
- **Unassigning Callbacks**
- **Performing Callbacks**

### Overview

**Oracle Utilities Network Management System Web Callbacks** is an application used to manage callback requests for customers who have called in reporting an outage. When the outage is resolved, Web Callbacks provides the information necessary to call customers. Web Callbacks allows you to assign groups of callbacks to users and outsourcing agencies, and also supports a “one-at-a-time” approach, where you can select an outage and perform the next callback. Callbacks are only created for customers who called in and had “Callback Requested” indicated when their call was entered.

Web Callbacks displays information about the outage and the original customer call, and allows you to save the results of the callback (power restored, phone busy, power still out, etc.). Customers whose power is not restored are re-introduced into the Oracle Utilities Network Management System for re-analysis and restoration. A Still Out trouble code clue, which appears in Clues field in Work Agenda and Trouble Info, is added to calls re-introduced in this way. Web Callbacks interfaces with other Oracle Utilities Network Management System modules to display customer comments and operations remarks.

### Starting Web Callbacks

Web Callbacks is accessed using a URL (web address) or as a local application, depending on your site's policy. Your system administrator determines the web address, if applicable. If accessing Web Callbacks from a browser, complete these steps:

- Open your web browser by clicking the shortcut on the desktop, or from the Start menu.
- In the Address field of the browser, enter the URL for Web Callbacks, then press Enter. Please wait while Web Callbacks starts.

- If this is the first time running an Oracle Utilities Network Management System Windows-based product on your PC, you may be prompted to do a one-time download of a Java plugin. If so, select Yes/Accept/Agree on all subsequent dialogs until Web Callbacks opens.

**Note:** You or your system administrator can add Web Callbacks to your Start menu and/or create a shortcut icon on your desktop for quick access to Web Callbacks. When you start up Web Callbacks for the first time, it will (depending on installation method) ask if you want to install a shortcut in your Start menu and on your desktop.

## Logging In

The Login window is the first Web Callbacks window you see. You must enter a valid user name and password, and then click the **Validate** button. Once your user name and password are validated, the system populates the option menu that allows you to select a user type.

The Login window displays the following fields and buttons:

- The **User ID** field allows you to enter the user name provided to you by the system administrator.
- The **Password** field allows you to enter the password provided to you by the system administrator.
- The **Validate** button verifies your login credentials. If the user name and password are not entered correctly, the system displays a warning dialog box.
- The **User Type** drop-down menu contains the list of user types within your authority.
- The **Login** button allows you to complete the login process. Once you click the Login button, the Web Callbacks window opens.
- The **Quit** button exits the Login window.

## Logging In

To login to Web Callbacks, complete these steps:

1. Depending on how your system was installed, do one of the following:
  - Click the **Web Callbacks** icon found under the appropriate program group in your Windows Start Menu.
  - Double-click the **Web Callbacks** icon on your desktop.
  - Open a web browser and type the Web Callbacks URL in the browser's Address field.

The Web Callbacks Login window displays.

2. Enter your user name in the User Name field.
3. Enter your password in the Password field.
4. Click the **Validate** button. The bottom portion of the Web Callbacks Login window sensitizes.
5. Select the appropriate User Type from the drop-down menu.
6. Click the **Login** button. The main Web Callbacks window will display.

# The Web Callbacks Window

The Web Callbacks main window displays all of the events that have callbacks that must be completed. You can perform callback actions in the window using the menu, the buttons on the toolbar, or the buttons at the bottom of the window.

The following topics describe how to use the Web Callbacks window:

- **Menus**
- **Toolbar**
- **Header**
- **Callbacks Table**
- **Callbacks Summary Panel**
- **Callbacks Buttons**
- **Status Bar**

Related Topics:

- **Starting Web Callbacks**
- **Assigning Callbacks**
- **Viewing Callback Assignments**
- **Unassigning Callbacks**
- **Performing Callbacks**




## Menus

The Web Callbacks menu bar provides access to all functions. The commonly used functions are also available on the toolbar and in buttons at the bottom of the window. There are three menus on the Web Callbacks menu bar: File, Actions, and Help.

- **Actions Menu**
  - **View My Callback Lists...** - Opens the View My Callback Lists window, which displays a list of callbacks assigned to you.
  - **Perform Next Callback...** - Opens the Perform Next Callback window, which allows you to perform the next callback for the selected event.
  - **Assign Callbacks...** - Opens the Assign Callbacks window, which allows you to assign callbacks for the selected event.
- **Help Menu**
  - **Web Callbacks Help (F1)** - Opens the online help content for Web Callbacks.
  - **About Web Callbacks** - Opens the About window, which provides system information.
- **Logout Menu**
  - **User Logout** - exits **Web Callbacks**.

## Toolbar

The Web Callbacks toolbar provides a shortcut to many of the options available from the Web Callbacks menus. The following table describes the buttons on the Web Callbacks Toolbar.

Button	Description
 View My Callbacks Lists	Opens the View My Callback Lists window, which displays a list of callbacks assigned to you.
 Perform Next Callback	Opens the Perform Next Callback window, which allows you to perform the next callback for the selected event.
 Assign Callbacks	Opens the Assign Callbacks window, which allows you to assign callbacks for the selected event.

## Header

Beneath the Web Callbacks Toolbar is the header section. This section contains information regarding who is logged in to the application.

- The **User Name** field displays your Web Callbacks login user name. This field is not editable.

## Callbacks Table

The Web Callbacks table contains a detailed list of each resolved event that still has callbacks remaining. These rows are color-coded by the status of the callback (not started vs. in progress).

The Callbacks Table displays the following columns:

- The **Event #** column contains the unique number of the event.
- The **# Callbacks** column contains the number of callbacks for the event.
- The **# Pri** column contains the number of callbacks from priority calls for the event.
- The **% Comp** column contains the percentage of callbacks completed for the event.
- The **# Rem** column contains the number of callbacks remaining for the event.
- The **# Asn** column contains the number of remaining callbacks for the event that have been assigned.
- The **Start Date** column contains the reported start date and time of the event.
- The **Restore Date** column contains the date and time the event was restored.
- The **Device** column contains the name of the device associated with the event.
- The **Status** column contains the status of callbacks for the event:
  - **In Progress** - Some callbacks for the event have been completed.
  - **Not Started** - Some callbacks for the event may have been assigned, but no callbacks are completed.
- The **Substation** column contains the name of the substation for the device associated with the event.
- The **Zone** column contains the name of the branch office where the event occurred.
- The **# Users** column contains the number of users with assigned callbacks for the event.



## Callbacks Table Column Features

Web Callbacks allows you to sort columns of its table by clicking on the particular column. The column displays an ascending sort after the first click and a descending sort after the second. A black arrow displays the direction of the sort. Clicking on other columns will initially sort based on the opposite sort type from the last column (ascending if previous column was sorted descending) and the sort direction reverses with subsequent clicks.

### Sorting Callbacks

To sort based on a callback list column, complete these steps:

1. Click on the column that you want to sort. The column sorts in ascending order, indicated by a black arrow pointing upward.
2. Click again to sort the column in descending order, indicated by a black arrow pointing downward.
3. Click on a different column and the list is sorted ascending based on that column.

### Rearranging Columns

You can dynamically rearrange the columns in a Web Callbacks list by dragging and releasing the column headers. To rearrange the columns, complete these steps:

1. On the column header for the column you want to move, click and hold down the mouse button with the pointer.
2. Move the pointer to drag the column left or right to the new location.
3. Release the mouse button. The column appears in the new location.

Note that this change is temporary. The next time you start Web Callbacks, the columns will display in their default order.

## Callbacks Summary Panel

The Callbacks Summary panel appears in the lower portion of the Web Callbacks window. This panel displays summary information from the callback list. The Callbacks Summary panel includes the following fields:

- The **# Callbacks** field displays the total number of callbacks from events that still have active callbacks.
- The **% Complete** field displays the total percentage of callbacks listed in **# Callbacks** that are complete.
- The **# Remaining** field displays the total number of callbacks not completed, based on the **# Callbacks**.
- The **# Priority Calls** field displays the total number of callbacks that were priority, meaning those where the original call was for a priority situation (*e.g.*, hazardous downed wire).

**Note:** Once all callbacks for an event have been completed, they are removed from the data displayed in the Callbacks Summary Panel. As a result, the % Complete can actually decrease when the last callback for an event is completed and that event is removed from the calculation.

## Callbacks Buttons

The buttons on the bottom of the main Web Callbacks window comprise commonly used functions.

- The **View My Callbacks Lists...** button opens the View My Callback Lists window, which displays a list of callbacks assigned to you.

- The **Perform Next Callback...** button opens the Perform Next Callback window, which allows you to perform the next callback for the selected event.
- The **Assign Callbacks...** button opens the Assign Callbacks window, which allows you to assign callbacks for the selected event.

## Status Bar

The status bar appears at the bottom of the Web Callbacks window, providing informational messages to the user at various times. Messages will appear in the status bar when callbacks are assigned, unassigned, or cancelled, when callbacks are saved or when a new callbacks user is created.

## Assigning Callbacks

The Assign Callbacks window is used to assign callbacks for a specific event to you and/or other logged in users in order to manage the completion of the callback requests. If callbacks have been assigned to a user and that person is unable to complete the callbacks in a timely fashion, you can unassign those callbacks.

To access the Assign Callbacks window, select an event in the main Web Callbacks window, and then do one of the following:

- Select the **Assign Callbacks...** option from the Actions menu, or
- Click the **Assign Callbacks** button [X] on the toolbar, or
- Click the **Assign Callbacks...** button beneath the Callbacks Summary panel.

This section includes the following topics:

- **Using the Assign Callbacks Window**
- **Assigning Numbers of Callbacks**
- **Assigning Percentages of Callbacks**
- **Assigning All Remaining Callbacks**
- **Reassigning All Remaining Callbacks**
- **Unassigning Callbacks**

## Using the Assign Callbacks Window

The Event Info panel at the top of the Assign Callbacks window provides summary information about the event. The Event Callbacks panel provides a current status of callback assignments for the event per user, and allows you to change the number or percentage of assigned callbacks for each user.

**Note:** When assigning callbacks to multiple users, you can assign a specific number of callbacks for the event to each user, or assign a percentage of the callbacks to each user.

The Assign Callbacks window displays the following fields and buttons:

- The **Event #** field displays the event number for which callbacks are being assigned.
- The **Device** field displays the name of the device associated with the event.
- The **Substation** field displays the name of the substation associated with the event.
- The **Total Callbacks** field displays the total number of callbacks for the event.
- The **% Complete** field displays the percentage of callbacks that are complete for the event.

- The **# Unassigned** field displays the number of callbacks for the event that have not been assigned.
- The **User Name** column contains the user name for each user currently logged in to the system. Other users appear in this column if they are permanently available (*e.g.*, a third party agency or IVR system). You can assign callbacks to any user in this column.
- The **Include Priority Calls** column contains a check box that allows you to specify whether you want to include priority calls in the callback assignments for the user. This option may not be available for certain users, such as third party agencies or IVR.
- The **% Assigned** column contains the percentage of the total number of callbacks assigned to the user for the event. You can assign a specific percentage to the user by editing this field and then pressing the <Enter> key. If the percentage does not result in an exact number of callbacks (*e.g.*, the callback assignment would be 4.78), the system rounds to the nearest number (in this case, 5).
- The **# Asn** column contains the number of callbacks assigned to the user for the event. You can assign a specific number of callbacks to each user by editing this field and then pressing the <Enter> key.
- The **# Pri** column contains the number of callbacks for priority calls assigned to the user for the event. This column is not editable.
- The **# Rem** column contains the number of callbacks remaining assigned to the user for the event. This column is not editable.
- The **% Comp** column contains the percentage of the total number of callbacks assigned to the user for the event that are complete. This column is not editable.

#### Buttons

- The **Save** button saves any callback assignment changes and closes the Assign Callbacks window. There is also an option under the Assign Callbacks window's Actions menu for this action.
- The **Unassign** button unassigns the remaining uncompleted callbacks for the event for the selected user and closes the Assign Callbacks window. There is also an option under the Assign Callbacks window's Actions menu for this action.
- The **Assign Remaining** button assigns the remaining unassigned callbacks for the event to the selected user and closes the Assign Callbacks window. There is also an option under the Assign Callbacks window's Actions menu for this action.
- The **Exit** button closes the Assign Callbacks window without saving any changes. There is also an option under the Assign Callbacks window's File menu for this action.

## Assigning Callbacks to Users

You can assign callbacks to yourself or to another user that is currently logged into the system, or to an external service if it has been set up in your system. All of the users that have access to the system can assign callbacks to themselves and to others.

## Assigning Numbers of Callbacks

When assigning callbacks for an event, you can assign all callbacks to a single user or distribute the callbacks to multiple users. To assign a specific number of callbacks, follow these steps:

1. Select an event with multiple unassigned callbacks from the Web Callbacks main window.
2. Do one of the following:
  - Click the **Assign Callbacks** button on the toolbar, or

- Select the **Assign Callbacks...** option from the Actions menu, or
  - Click the **Assign Callbacks...** button below the Callbacks Summary panel. The Assign Callbacks window opens.
3. Select the **# Asn** column for a user from the list of users.
  4. Type the number of callbacks you want to assign to the user.
  5. If the event has additional callbacks, select the column for another user and enter the number of callbacks that you want to assign to that user.
  6. Once you have assigned all of the callbacks that you want to assign, click the **Save** button. The Assign Callbacks window closes.

## Assigning Percentages of Callbacks

When assigning callbacks for an event, you can assign all callbacks to a single user, or distribute the callbacks to multiple users by percentage. To assign a percentage of callbacks for an event to a user, complete these steps:

1. Select an event with multiple unassigned callbacks from the Web Callbacks main window.
2. Do one of the following:
  - Click the **Assign Callbacks** button on the toolbar, or
  - Select the **Assign Callbacks...** option from the Actions menu, or
  - Click the **Assign Callbacks...** button below the Callbacks Summary panel. The Assign Callbacks window opens.
3. Select the **% Assigned** column for a user.
4. Type “50” and press **Enter**. This will assign 50% of the callbacks to the selected user.
5. Click the **Save** button. The Assign Callbacks window closes.

## Assigning All Remaining Callbacks

To assign all remaining callbacks for an event to a single user, complete these steps:

1. Select an event with multiple unassigned callbacks from the Web Callbacks main window.
2. Do one of the following:
  - Click the **Assign Callbacks** button on the toolbar, or
  - Select the **Assign Callbacks...** option from the Actions menu, or
  - Click the **Assign Callbacks...** button below the Callbacks Summary panel. The Assign Callbacks window opens.
3. Select the **User Name** column for a user.
4. Click the **Assign Remaining** button. All remaining unassigned callbacks are assigned to the selected user. The Assign Callbacks window closes.

## Reassigning All Remaining Callbacks

To reassign all remaining event callbacks for a user to another user, complete these steps:

1. Select the event with assigned callbacks for a user from the Web Callbacks main window.
2. Do one of the following:
  - Click the **Assign Callbacks** button on the toolbar, or
  - Select the **Assign Callbacks...** option from the Actions menu, or

- Click the **Assign Callbacks...** button below the Callbacks Summary panel. The Assign Callbacks window opens.
- 3. Select the **User Name** column for the user with uncompleted assigned callbacks.
- 4. Click the **Unassign** button. All remaining assigned callbacks for the selected user are now unassigned. The Assign Callbacks window closes.
- 5. Reopen the Assign Callbacks window using one of the methods above.
- 6. Select the **User Name** column for the user you wish to perform the remaining callbacks.
- 7. Click the **Assign Remaining** button. All remaining unassigned callbacks are assigned to the selected user. The Assign Callbacks window closes.

## Viewing Callback Assignments

With the View My Callback Lists window, you can view all of the callbacks currently assigned to you. To access the View My Callback Lists window, do any of the following:

- Select the **View My Callback Lists...** option from the Actions menu, or
- Click the **View My Callback Lists** button [X] on the toolbar, or
- Click the **View My Callbacks Lists...** button beneath the Callbacks Summary panel.

This section includes the following topics:

- **View My Callback Lists Window**
- **Viewing Your Callback Assignments**
- **Canceling Your Callback Assignments**

## View My Callback Lists Window

The View My Callback Lists window displays the following fields and buttons:

- The **User Name** field displays the user name that you are logged in as.
- The **# of Callback Lists Assigned** field displays the total number of events for which you have callback assignments.
- The **Event #** column contains the event number associated with the callback list.
- The **# Callbacks** column contains the number of callbacks assigned to you for the event.
- The **# Pri** column contains the number of priority calls among your assigned callbacks for the event.
- The **% Comp** column contains the percentage of your assigned callbacks that are complete.
- The **# Rem** column contains the number of callbacks assigned to you for the event that need to be completed.
- The **Restore Date** column contains the date and time the event was restored.
- The **Device** column contains the name of the device associated with the event.
- The **Substation** column contains the name of the substation for the device associated with the event.

### Buttons

- The **Unassign All** button unassigns all of your remaining callbacks for all lists. This might be done if you are taking a break and therefore need to make the callbacks available for others to do. There is also an option under the View My Callback Lists window's Actions menu for this action.

- The **Perform Callback List...** button opens the Perform Callback List window for the selected event, which allows you to enter the callback response for each callback assigned to you from that event. There is also an option under the View My Callback Lists window's Actions menu for this action.
- The **Cancel Callbacks** button allows you to cancel all of your remaining callbacks for the selected event and consider them complete.
- The **Exit** button closes the View My Callback Lists window.

## Viewing Your Callback Assignments

To view callbacks assigned to you, complete these steps:

1. Do one of the following:
  - Click the **View My Callback Lists** button on the toolbar, or
  - Select the **View My Callback Lists...** option from the Actions menu, or
  - Click the **View My Callback Lists...** button below the Callbacks Summary panel.

The View My Callback Lists window opens, displaying all events with callbacks assigned to you.

2. Click the **Exit** button to exit the View My Callbacks Lists window.

## Canceling Your Callback Assignments

To cancel callbacks assigned to you for a specific event, complete these steps:

1. Do one of the following:
  - Click the **View My Callback Lists** button on the toolbar, or
  - Select the **View My Callback Lists...** option from the Actions menu, or
  - Click the **View My Callback Lists...** button below the Callbacks Summary panel.

The View My Callback Lists window opens, displaying all events with callbacks assigned to you.

2. Select the row of the event you wish to cancel your assigned callbacks for.
3. Click the **Cancel Callbacks** button. A confirmation dialog appears.
4. Click the **Yes** button on the confirmation dialog. Your assigned callbacks for that event are now considered complete. If there are no more uncompleted callbacks assigned to other users remaining for that event, that event row will disappear from the window. Otherwise, that event row will remain displayed until all callbacks for that event are complete.
5. Click the **Exit** button to exit the View My Callbacks Lists window.

## Unassigning Callbacks

You can unassign callbacks that have not been completed. You may unassign callbacks for a single event, or unassign all callbacks assigned to you.

**Note:** If you exit Web Callbacks, the system automatically unassigns all of your remaining callbacks.

This section includes the following topics:

- **Unassigning Callbacks for a Specific Event**
- **Unassigning All of Your Callbacks**

## Unassigning Callbacks for a Specific Event

To unassign callbacks for a specific event, complete these steps:

1. On the main Web Callbacks window, select the event for which you want to unassign callbacks.
2. Do one of the following:
  - Click the **Assign Callbacks** button on the toolbar, or
  - Select the **Assign Callbacks** option from the Actions menu, or
  - Click the **Assign Callbacks...** button below the Callbacks Summary panel. The Assign Callbacks window opens.
3. Select the **User Name** column for the user whose callbacks you wish to unassign.
4. Do one of the following:
  - To unassign all of the user's remaining callbacks for the event, click the **Unassign** button. The Assign Callbacks window closes.
  - To unassign a portion of the user's remaining callbacks for the event, enter a lower number of callbacks in the # Asn column for the user, or a lower percentage of callbacks in the % Assigned column, then press the <Enter> or <Tab> key. Click the **Save** button. The Assign Callbacks window closes.

## Unassigning All of Your Callbacks

To unassign all of your callbacks, complete these steps:

1. Do one of the following:
  - Click the **View My Callback Lists** button on the toolbar, or
  - Select the **View My Callbacks Lists...** option from the Actions menu, or
  - Click the **View My Callback Lists...** button below the Callbacks Summary panel.

The View My Callback Lists window opens, displaying all events with callbacks assigned to you.

2. Click the **Unassign All** button. A confirmation dialog appears.
3. Click **Yes** on the confirmation dialog. The View My Callback Lists window closes.

## Performing Callbacks

Once you have assigned callbacks to yourself, or another user has assigned callbacks to you, you can complete those callbacks using the Perform Callback List window. You may also perform callbacks that are unassigned (not currently assigned to any user) using the Perform Next Callback window.

The Perform Callback List window is used to record the results as you are completing your assigned callbacks for an event. The Event Information panel at the top of the window provides summary information about the event. The Event Callbacks Summary panel provides a status of your callback assignments for the event. The callback list table lists customers who have requested a callback for the event, and the Additional Customer Information panel provides more details regarding the customer selected in the callbacks list table.

This section includes the following topics:

- **Accessing the Perform Callback List**
- **Using the Perform Next Callback Window**
- **Performing Assigned Callbacks for an Event**
- **Performing Unassigned Callbacks (Next Callback)**

### Accessing the Perform Callback List

To access the Perform Callback List window:

1. Do one of the following:
  - Click the **View My Callback Lists** button on the toolbar, or
  - Select the **View My Callback Lists...** option from the Actions menu, or
  - Click the **View My Callback Lists...** button below the Callbacks Summary panel.

The View My Callback Lists window opens, displaying all events with callbacks assigned to you.

2. Select a row for an event in the View My Callback Lists table and either:
  - Select the **Perform Callback List...** option from the Actions menu, or
  - Click the **Perform Callback List...** button.

The **Using the Perform Callbacks List Window** opens.

### Using the Perform Callbacks List Window

The Perform Callbacks List window displays the following information:

- The **Event #** field displays the event number for which callbacks are being performed.
- The **Substation** field displays the name of the substation associated with the event.
- The **Zone** field displays the name of the branch office associated with the event.
- The **Device** field displays the name of the device associated with the event.
- The **Start Date** field displays the date and time the event began.
- The **Restore Date** field displays the date and time the event was restored.
- The **Operations Event Note** field displays any comments entered for the event by operations staff.
- The **# Callbacks** field displays the total number of your assigned callbacks for the event.
- The **# Remaining** field displays the number of your callbacks remaining for the event.



- The **% Complete** field displays the percentage of your callbacks that are complete for the event.
- The **Account #** column contains the customer account number.
- The **Name** column contains the name of the customer to be called back.
- The **Telephone** column contains the telephone number on record for the customer.
- The **Callback Phone** column contains the alternate telephone number (*e.g.*, cell phone) for the customer, if provided during original call.
- The **Call Before Date** column contains the date and time after which the customer does not wish to be called.
- The **Callback Status** column is a drop-down menu that lets you select the result of the call to the customer. This is the only editable field on the form. See **Callback Status** on page B-4 for status colors and descriptions.
- The **Callback Date** column contains the date and time the callback was performed. This column is automatically populated when you change the Callback Status.
- The **Customer Type** column contains an indication of whether the customer is a critical customer (*e.g.*, medical or key account).
- The **Priority** checkbox indicates whether or not the callback is associated with a priority call.
- The **Device** field in the Additional Customer Information panel displays the name of the selected customer's service device.
- The **Address** field displays the selected customer's service address.
- The **City** field displays the selected customer's city.
- The **Clues** field displays the trouble code clues received for the customer's call.
- The **Customer Comment** field displays the customer comments entered when the customer called, if any.

#### Buttons

- The **Save** button saves all callback status changes since the last save. This can be done after each callback (recommended), after every several callbacks, or just before exiting. There is also an option under the Perform Callback List window's File menu for this action.
- The **Cancel Callbacks** button allows you to cancel all of your remaining callbacks for the selected event and consider them complete.
- The **Exit** button closes the Perform Callback List window, returning you to the View My Callback Lists window. There is also an option under the Perform Callback List window's File menu for this action.

## Performing Assigned Callbacks for an Event

Once you have been assigned a number of callbacks, you can begin completing them. To perform a callback, complete these steps:

1. Do one of the following:
  - Click the **View My Callback Lists** button on the toolbar, or
  - Select the **View My Callback Lists...** option from the Actions menu, or
  - Click the **View My Callback Lists...** button below the Callbacks Summary panel.

The View My Callback Lists window opens, displaying all events with callbacks assigned to you.

2. Select a row for an event in the View My Callback Lists table and either:

- Select the **Perform Callback List...** option from the Actions menu, or
- Click the **Perform Callback List...** button.

The Perform Callback List window opens displaying the details of the event and information for each customer to be called back.

3. Select a row for the callback you want to perform. At this time, you would physically make the call to the customer. Use the Callback Phone number if it exists. Otherwise use the number listed in the Telephone column.
4. Once the call is complete, change the Callback Status based on the result (*e.g.*, restored).
5. Click the **Save** button.
6. Make any remaining callbacks and change the Callback Status accordingly. Make sure that you click the **Save** button before exiting if you aren't saving after each call.
7. Click the **Exit** button when you have completed all of the callbacks.

## Performing Unassigned Callbacks (Next Callback)

You can perform callbacks that are not assigned to any user using the Perform Next Callback window. This window allows you to select events from the main window and perform callbacks that have not yet been assigned to a user. The Perform Next Callback window displays the same information as the Perform Callback List window, just in a different order.

The callback that displays is automatically assigned to you so it cannot be assigned to anyone else. If you save a Callback Status of anything other than “Restored,” “Not Restored,” or “Cancel,” the callback is not considered complete and remains assigned to you. If you do not save a Callback Status, the callback will be unassigned when you exit the Perform Next Callback window. You can also continue to process unassigned callbacks for this event by clicking the **Next Callback** button.

This section includes the following topics:

- **Using the Perform Next Callback Window**
- **Performing the Next Unassigned Callback for an Event**

### Using the Perform Next Callback Window

To access the Perform Next Callback window, select an event in the main Web Callbacks window that has unassigned callbacks remaining, and then do one of the following:

- Click the **Perform Next Callback** button on the toolbar, or
- Select the **Perform Next Callback...** option from the Actions menu, or
- Click **Perform Next Callback...** button beneath the Callbacks Summary panel.

The Perform Next Callback Window displays the following fields and buttons:

- The **Event #** field displays the event number for which callbacks are being performed.
- The **Substation** field displays the name of the substation associated with the event.
- The **Zone** field displays the name of the branch office associated with the event.
- The **Device** field displays the name of the device associated with the event.
- The **Start Date** field displays the date and time the event began.
- The **Restore Date** field displays the date and time the event was restored.
- The **Operations Event Note** field displays any comments entered for the event by operations staff.
- The **# Callbacks** field displays the total number of callbacks for the event.

- The **# Remaining** field displays the number of callbacks remaining for the event.
- The **% Complete** field displays the percentage of callbacks that are complete for the event.
- The **Account #** field displays the selected customer's account number.
- The **Name** field displays the name of the customer to be called back.
- The **Address** field displays the selected customer's service address.
- The **City** field displays the selected customer's city.
- The **Customer Type** field displays an indication of whether the customer is a critical customer (*e.g.*, medical or key account).
- The **Device** field in the Customer Information panel displays the name of the selected customer's service device.
- The **Clues** field displays the trouble code clues received for the customer's call.
- The **Customer Comment** field displays the customer comments entered when the customer called, if any.
- The **Priority** checkbox indicates whether or not the callback is associated with a priority call.
- The **Telephone** field displays the telephone number on record for the customer.
- The **Callback Phone** field displays the alternate telephone number (*e.g.*, cell phone) for the customer, if provided during original call.
- The **Callback Status** column is a drop-down menu that lets you select the result of the call to the customer. See **Callback Status** on page B-4 for status colors and descriptions.
- The **Callback Date** column contains the date and time the callback was performed. This column is automatically populated when you change the Callback Status.

#### Buttons

- The **Next Callback** button populates the Perform Next Callback window with the next unassigned callback for this event, if any, and assigns the callback to you. There is also an option under the Perform Next Callback window's Actions menu for this action.
- The **Save** button saves the result for this callback and enables the Next Callback button. There is also an option under the Perform Next Callback window's File menu for this action.
- The **Exit** button closes the Perform Next Callback window. There is also an option under the Perform Next Callback window's File menu for this action.

### Performing the Next Unassigned Callback for an Event

To perform the next unassigned callback for an event, complete these steps:

1. On the Web Callbacks main window, select an event that has unassigned callbacks remaining (# Asn column less than # Rem column).
2. Do one of the following:
  - Click the **Perform Next Callback** button on the toolbar, or
  - Select the **Perform Next Callback...** option from the Actions menu, or
  - Click the **Perform Next Callback...** button beneath the Callbacks Summary panel.

If all callbacks for the selected event have been assigned, an error dialog displays.
3. Place the phone call to the customer, using the phone number listed in the Callback Phone field, if provided. Otherwise, use the number in the Telephone field.
4. When the call is complete, select the appropriate option from the Callback Status drop-down menu.

5. Click the **Save** button.
6. If there are unassigned callbacks remaining for the event and you want to perform them, click the **Next Callback** button and repeat the three previous steps.
7. Click the **Exit** button to close the Perform Next Callback window.

**Note:** The callback accessed from the Perform Next Callback window is assigned to you when the window opens to prevent another user from being assigned to it as well. If you save a result for the callback that does not actually complete it (*e.g.*, Busy, No Answer) and then exit the Perform Next Callback window, it will remain assigned to you. If you exit the Perform Next Callback window without saving a result for the callback, the callback returns to being unassigned.

# Chapter 5

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## Storm Management

This chapter describes the **Oracle Utilities Network Management System Storm Management** application. It includes the following topics:

- **Getting Started with Storm Management**
- **Storm Management Full Operations Environment**
- **Storm Management Information Overview**
- **View Only Environment**
- **Storm Administration Environment**

### Getting Started with Storm Management

**Storm Management** enables you to manipulate the event and crew information that the system will use to make its calculations. This section describes the login, menus, toolbar, and status bar, and other common sections of **Storm Management**.

**Note:** Many utilities have different rules sets configured for storms versus normal conditions, which will affect the operation of **Storm Management**. Changing rule sets is done using the **Change Rule Set...** button on the **Web Workspace Authority** tool. For information on changing rule sets, see **Changing Rule Sets** on page 2-41.

### Login Window

The Login window is the first **Storm Management** window you see. You must enter a valid user name and password, and then click the **Validate** button. Once your user name and password are validated, the system populates the option menu that allows you to select a user type. You will see different initial windows and options depending upon the user type specified.

The Login window displays the following fields and buttons:

- The **User ID** field allows you to enter the user name provided to you by the system administrator.
- The **Password** field allows you to enter the password provided to you by the system administrator.
- The **Validate** button verifies your login credentials. If the user name and password are not entered correctly, the system displays a warning dialog box.
- The **User Type** drop-down menu contains the list of user types within your authority.

- Full Operations: provides Storm Management functionality for the operations user to edit storm, system, and crew criteria. See **Storm Management Full Operations Environment** on page 5-3 for details of the Full Operations environment
- View Only: displays the information available to the Full Operations environment in a read-only mode. See **View Only Environment** on page 5-36 for details.
- Storm Administration: provides a post-storm data maintenance environment. See **Storm Administration Environment** on page 5-38 for details.
- The **Login** button allows you to complete the login process. Once you click the Login button, the appropriate Storm Management window opens, based upon the User Type selected.
- The **Quit** button exits the Login window.

## Logging In

To login to **Storm Management**, complete these steps:

1. Depending on how your system was installed, do one of the following:
  - Click the **Storm Management** icon found under the appropriate program group in your Windows Start Menu, or
  - Double click the **Storm Management** icon on your desktop, or
  - Open a web browser and type the **Storm Management** URL in the browser's Address field. The Storm Management Login window displays.
2. Enter your user name.
3. Enter your password.
4. Click the **Validate** button. The bottom portion of the Storm Management Login window sensitizes.
5. Select the appropriate **User Type** from the drop-down menu:
6. Click the **Login** button. The appropriate Storm Management window opens.
7. Click the **Login** button to finish logging in.

# Storm Management Full Operations Environment

This section describes the Storm Management window and general functionality. It includes the following topics:

- **User Interface Features**
  - **Menus**
  - **Status Bar**
  - **Storm Management Information Panels**

## User Interface Features





### Menus


There are four menus on the Storm Management menu bar:

- **System Menu**
- **Storm Menu**
- **Help Menu**
- **Logout Menu**

### System Menu






The options in the System menu are available in both storm and non-storm modes. The following table describes the System Menu options and associated toolbar icons.

Menu Option	Description	Toolbar Icon
Toggle Storm Mode...	Used to transition a control zone between the Storm Management non-storm and storm modes of operation. Opens the Define Storm dialog, prompting you to enter the information required to transition between modes. This option is not available in study mode.	
Save Changes	Saves any changes made in the window outside of the Crew Information table.	
ERT Override...	While periodically simulating the restoration process, Storm Management makes an estimated assessment and calculates an <i>Estimated Restoration Time</i> (ERT) for each eligible event. The estimates are accessible to other NMS modules.  This option opens the <b>ERT Override</b> dialog, which allows the accessibility of the Storm Management estimates to other modules to be turned on and off at any control zone level, and also allows for an alternate global or <i>tiered</i> estimate to be applied at any control zone level instead. The ERT Delays tab allows the user to adjust <b>calculated</b> ERT values, for any control zone, with a delay factor.	
Force Simulation Run	Immediately invokes the simulation of the entire restoration process, recalculating the estimates. This option is typically only used in study mode.	

Menu Option	Description	Toolbar Icon
Retrieve Update	Refreshes the window with the most recent information from the system. In most cases, the window refreshes itself on a periodic basis. But, if there are unsaved changes in the Storm Management window at the time the automatic refresh is due to occur, the window will not refresh. Instead, an alert appears in the status bar indicating that an update is available, and the Retrieve Update option must be invoked in order to refresh the window with the new update. This allows you to continue making your changes and save them first before refreshing.	
Print All...	Opens the Print Preview dialog, which allows you to print out the Summary Information panel, Storm Report panel, Storm Information panel (if present), Crew Information panel (if present), and status bar information from the current Storm Management window. See <b>Printing</b> on page 1-14 for details on printing and using the Print Preview window.	--
Print Crews...	Opens the Print Preview dialog, which allows you to print out the Crew Information panel from the current Storm Management window. This option is only available in storm mode.	--

### Storm Menu

The options in the Storm menu are only enabled when Storm Management is in storm mode. The following table describes the Storm Menu and associated toolbar options.

Menu Option	Description	Toolbar Icon
Toggle Study Mode	Toggles the Storm Management window between real-time and study modes of operation. The current mode is displayed in the status bar.	
Export Study Session	When in study mode, allows you to export the current study session crews and parameters to the real-time session.	
Reset Study Session	When in study mode, allows you to reset the current study session with the current real-time session crews and parameters.	
Forecast Profiles...	Opens the Forecast Profiles dialog, which is used to save and pre-load outage forecasting parameters. This option is only available in storm mode at the simulation level.	
Calculate Crews...	Opens the Calculate Crews dialog, which is used to determine the approximate number of crews needed to complete assessment and repair by a specified date and time.	



## Help Menu

The options in the Help menu are available at all times. The following table describes the Help Menu options.

Option	Description
Storm Management Help (F1)	Opens the Online Help content for Storm Management.
About Storm Management	Opens a dialog that displays information regarding what version of the application is presently running, as well as version and other information about the Oracle Utilities Network Management System Web Gateway that the application is using.

## Logout Menu

The Logout menu provides the User Logout option, which immediately logs the user out of **Storm Management** and closes the application.

## Status Bar

The status bar appears at the bottom of the Storm Management window, providing operating details for the system. The status bar displays the following fields:

- The **Last Update** field displays a timestamp indicating the date and time at which the most recent estimates were calculated.
- The **Update** field is an indicator that changes from “*No Update*” to “*Available Update*” (with a highlighted background) when there are unsaved changes at the time the automatic refresh of the Storm Management window is due to occur. The refresh does not occur until you click the Retrieve Update button on the toolbar or select the Retrieve Update option from the System menu.
- The **Real-Time/Study Mode** field displays “*Study Mode*” when the currently selected control zone is in the Storm Management study mode of operation and “*Real-Time Mode*” with a highlighted background when the zone is in real-time mode.
- The **Storm/Non-Storm Mode** field displays “Non-Storm Mode” when the currently selected control zone is in the Storm Management non-storm mode of operation and “Storm Mode” with a highlighted background when the currently selected zone is in the Storm Management storm mode of operation.
- The **ERT Override** field indicates whether any control zone in the system presently has its Storm Management estimates accessible to other modules (*e.g.*, may be displayed in an **Oracle Utilities Network Management System Work Agenda** column and available in **Oracle Utilities Network Management System Web Call Entry**) or overridden by an alternate estimate. If they are not accessible, or if they are overridden, this field displays “*ERT Override: On*” with a highlighted background. If not, this field displays “*ERT Override: Off*.”
- The **ERT Delay** field indicates if any ERT Delays are active. If there is an active ERT Delay, the field displays “*ERT Delay: On*” with a highlighted background. If not, the field displays the “*ERT Delay: Off*.”
- The **Lookups** field indicated the historical lookup value Shift, Season, and Day Type attributes that apply to the current time.

## Storm Management Information Panels

The **Storm Management Full Operations** environment is divided into panels that contain information in labeled and bordered panes. A pane may be visible or hidden based on whether **Storm Management** is in Non-Storm or Storm Mode.

Pane Name	Description	Displayed in Mode(s)
Zone Selection	The Zone Selection pane provides the Control Zone hierarchy in a tree view. An individual Control Zone may be selected for a given storm or to drill down to get information about that zone when the storm applies to a higher level zone.  See <b>Zone Selection</b> on page 5-9 for details.	Non-Storm, Storm
Storm Information	The Storm Information pane displays data entered when defining the storm.  See <b>Storm Information</b> on page 5-7 for details.	Storm
Summary Information	The Summary Information pane provides an overview of the estimates for both the selected zone and the Company level zone. See <b>Summary Information</b> on page 5-9 for details.	Non-Storm, Storm
Storm Report	The Storm Report pane provides an overview of the historical averages, actual averages, and estimates for each outage type in the currently selected control zone. See <b>Storm Report</b> on page 5-7 for details.	Non-Storm, Storm
Crew Information	The Crew Information pane lists crew information for the currently selected control zone and its children. Crews are grouped by skill/type and by control zone.	Storm

## Storm Management Information Overview

This section describes the Storm Management operating modes and related information displays:

- **Storm Management Modes**
- **Storm Information**
- **Summary Information**
- **Storm Report**
- **Zone Selection**

## Storm Management Modes

Storm Management has three modes of operation: *Non-storm*, *Storm*, and *Study*.

### Non-Storm Mode

Non-storm mode applies to everyday operations. When calculating estimates, crew resources are not taken into account because it is assumed there are enough crews available to handle all events. All control zone views operate in non-storm mode until explicitly placed into storm mode.

### Storm Mode

Storm mode is useful during and after a storm or other high volume outage period. In Storm mode, the estimate calculations factor in crew availability.

### Study Mode

Study mode enables you to manipulate parameters that affect the estimate calculations, such as outage forecasting, manual overrides, and crew information without altering the current real-time calculations. Also, once in study mode, the user can export parameters from the study session back into the real-time session.

## Storm Information

The Storm Information panel displays information about a defined storm (see **Using Define Storm Dialog** on page 5-16).

The Storm Information Panel displays the following fields:

- The **Storm Name** field displays the name of the storm. This field is not editable and is populated by information entered into the Storm Name field of the Define Storm dialog.
- The **Storm Start** field displays the starting date of the storm. This field is not editable and is populated by information entered into the Start Date field of the Define Storm dialog.
- **Storm Level** is a drop-down menu of severity levels of the storm. It is initially populated by the option selected on the Storm Level drop-down menu of the Define Storm dialog. If you modify the Storm Level for a control zone that has child zones as part of the same storm, the Storm Level for all of those child zones will be changed to the modified value as well.
- **Special Condition** is a drop-down menu of special storm types. It is initially populated by the option selected on the Special Condition drop-down menu of the Define Storm dialog. If you modify the Special Condition for a control zone that has child zones as part of the same storm, the Special Condition for all of those child zones will be changed to the modified value as well.

## Storm Report

The Storm Report is the main **Storm Management** pane. It provides an overview of the historical averages, actual averages, and estimates for each outage type in the currently selected control zone. Each time you select a different control zone from the Zone Selection tree, the Storm Report Panel refreshes to display the information for the newly selected zone.

The Storm Report pane displays the following columns:

- The **Outage Types** column contains the name of the Storm Management outage type category.
- The **Actual Outages** column contains the actual number of unrestored events of the corresponding outage type in the currently selected control zone.
- The **Total Outages** column contains the total number of forecasted outages of the corresponding outage type in the currently selected control zone. If the currently selected

control zone is operating storm mode, this value may be assigned or calculated as a percentage of the Actual Outages column using the Storm Management outage forecasting functionality. If the currently selected control zone is operating in non-storm mode, the value of this column is equal to the value of the Actual Outages column, because the outage forecasting functionality is not available in non-storm mode.

- The **Travel to Assess** column contains the average number of minutes between dispatch of an assessment crew and the arrival of that crew on the job site. The number outside of the parentheses is the historical average used in the Storm Management estimate calculations. The number in parentheses is the actual average that has been occurring out in the field over the past 2 hours.
- The **Assess** column contains the average number of minutes taken to assess the effort needed to restore/repair the event. The number outside of the parentheses is the historical average used in the Storm Management estimate calculations. The number in parentheses is the actual average that has been occurring out in the field over the past 2 hours.
- The **Travel to Repair** column contains the average number of minutes between dispatch of the repair crew and the arrival of that crew on the job site. The number outside of the parentheses is the historical average used in the Storm Management estimate calculations. The number in parentheses is the actual average that has been occurring out in the field over the past 2 hours.
- The **Repair** column contains the average number of minutes taken to restore/repair the event. The number outside of the parentheses is the historical average used in the Storm Management estimate calculations. The number in parentheses is the actual average that has been occurring out in the field over the past 2 hours.
- The **Clean** column contains the average number of minutes taken to by the repair crew to clean up after the event is restored before going to the next job. The number outside of the parentheses is the historical average used in the Storm Management estimate calculations. The number in parentheses is the actual average that has been occurring out in the field over the past 2 hours.
- The **Total Time to Assess hrs:min** column contains the raw amount of time required to assess all outages of the corresponding outage type in the currently selected control zone, in hours and minutes. The very basic formula for calculating this value is the following: (Travel to Assess + Assess) \* number of Actual Outages. However, if any outage forecasting or manual overrides are currently applied, or if the simulation has any of the outages projected to be assessed at a time that would use a different Travel to Assess or Assess time other than what's currently displayed in the Storm Management window, then that basic formula no longer holds.
- The **Estimated Assessed By** column contains the estimated date and time at which the last of all outages with the corresponding outage type in the currently selected control zone will be assessed.
- The **Total Time to Restore hrs:min** column contains the raw amount of time required to repair all events of the corresponding outage type in the currently selected control zone, in hours and minutes. The very basic formula for calculating this value is the following: (Travel to Repair + Repair) \* number of Actual Outages in non-storm mode, or (Travel to Repair + Repair + Clean) \* number of Actual Outages in storm mode. However, if any outage forecasting or manual overrides are currently applied, or if the simulation has any of the outages projected to be repaired at a time that would use a different Travel to Repair or Repair or Clean time other than what's currently displayed in the Storm Management window, then that basic formula no longer holds.
- The **Estimated Restored By** column contains the estimated date and time at which the last of all outages with the corresponding outage type in the currently selected control zone will be restored.

- The **Forecast Mode** drop-down menu enables you to select what kind of outage forecasting you want to apply. This field is only enabled when the currently selected control zone is one at the simulation level operating under storm mode. List options include:
  - **% Change** - Allows the % Change cell beneath the Actual Outages column to become editable, enabling you enter a percentage greater than 100. This increases the value in the Total Outages column for each outage type by that percentage.
  - **Value** - Allows the Total Outages cell for each outage type row to become editable. It also disables the % Change cell under the Actual Outages column.

## Summary Information

The Storm Management Summary Information panel provides an overview of the estimates for both the selected zone and the Company level zone. Each time you select a different control zone from the Zone Selection tree, the Summary Information Panel refreshes to display the information for the newly selected zone. (If you select the Company level zone, the Summary Information table contains only the one row of Company information.)

The Summary Information Panel displays the following fields:

- The **Zone** column contains the name of the Company level zone and the currently selected zone.
- The **Est Assessed By** column contains the estimated date and time when all assessment within the control zone will be complete.
- The **Est Restored By** column contains the estimated date and time when all events within the control zone will be restored.
- The **ERT Override** field displays the alternate estimated restoration time, if a published or non-published control-zone wide alternate estimate is currently being applied to the selected zone. See **ERT Override Dialog** on page 5-10 for more information.

## Zone Selection

The Zone Selection panel is available in both Non-Storm and Storm modes. **Storm Management** information is displayed on a per control zone basis, supporting views for the top three levels of the control zone hierarchy in the operations model. The top-level (usually the “Company” level) control zone view displays when Storm Management starts up.

### Selecting the Control Zone to View

You can view the information for another control zone by selecting that zone in the Zone Selection tree. The data displayed applies to the selected zone and all of its children. However, some components may be disabled if the currently selected control zone is not at the simulation level.

## Using Storm Management Modes

This section provides details on how to use Storm Management modes to analyze and manipulate its output:

- **Using Non-Storm Mode**
- **Using Storm Mode**
- **Using Study Mode**

## Using Non-Storm Mode

Non-storm mode applies to everyday operations. When calculating estimates, crew resources are not taken into account because it is assumed there are enough crews available to handle all events. All control zone views operate in non-storm mode until explicitly placed into storm mode.

This section includes the following topics:

- **Using ERT Overrides**
- **Manual Overrides**

### Using ERT Overrides

While it is periodically simulating the entire restoration process, **Storm Management** calculates an estimated assessment and restoration time for each eligible event. These estimates for each event are accessible to other modules (*e.g.*, may be displayed in a Work Agenda column). However, it is not always prudent to have these estimates available to the other modules; for example, when you initially enter storm mode and the available crew resources have not been fully defined, the calculated estimates would be rather inaccurate.

ERT Overrides also provides ERT Override tiering, which provides more granular override values based on the number of customers impacted by an event, and ERT Delays, which adds a delay factor to the calculated ERT.


### ERT Override Dialog

To open the ERT Override dialog, do one of the following:

- Select the **ERT Override...** option from the System menu, or
- Click the **ERT Override** button on the toolbar.

The ERT Override window opens with the ERT Override tab displayed. The ERT Delay functionality is accessed via the ERT Delay tab. Both window tabs offer consistent actions via the buttons at the bottom of the window.

#### ERT Override Tab Fields

- The **Zone** column contains the control zone that is having its Storm Management calculated estimates made inaccessible or overridden. With a row selected, click in the Zone field to activate the Control Zone Selection (  ), which will expand the Control Zone Selection dialog. Select the desired Control Zone and click OK to close the Control Zone Selection dialog
- The **Tier** column contains the optional tier criteria for using a given ERT Override value. See the **Add Tier** button description below to learn how to add tiers. Note that if tiers are used, the ERT Override field on the Summary Information panel will not display a value (since there will likely be more than one), but rather just display “Published” or “Non-Published.”
- The **ERT Override** column contains the estimated restoration date and time for all events within the control zone to be displayed outside of Storm Management. Once you click in the ERT Override column, a button displays. This button opens a calendar that enables you select a date and time. The date/time you enter must be in the future. This field may be left blank.
- The **Publish Projections** column contains a checkbox that indicates whether or not the ERT Override value is published to other modules for the affected events.
- The **User** column displays the id of the user who provided the ERT override/delay value.

## ERT Delay Tab

The ERT Delay tab exchanges the ERT Override column for a Delay column; all other columns function exactly the same as described in the ERT Override tab overview including the ability to add tiers to the delay.

- The **ERT Delay** column contains the delay to be added to the calculated ERTs within the control zone. Once you click in the ERT Delay column, a mask for hours and minutes is displayed (i.e., ##:##). Enter a delay value in hours and minutes to set the delay value. The ERT Delay will be activated once the OK button is clicked.

### Example - Using the Mask

If you want to add two hours and 15 minutes to the calculated ERT values, enter 0215; the mask will show 02:15. If you want to add 45 minutes, enter 0045.

## ERT Override Buttons

- The **Add** button adds a new row to the table in the ERT Override dialog. That row may then be edited to contain the desired control zone, ERT Tier (using the **Add Tier** button), ERT Override date/time, and publish values. If a row marked for removal is selected, pressing the Add button will undo the removal mark. New, unsaved rows display in the table as green. Edited, unsaved rows display in the table as cyan.
- The **Add Tier** button adds a tier to a *selected* row. The Tier column will be populated with an options menu that defaults to the first tier criteria. Clicking the menu will display all of the tiers configured in the system. If multiple tiers are configured with overlapping numbers of customers impacted, the first tier (T1) values will take precedence over the second (T2) and third (T3) tiers; likewise, T2 will take precedence over T3.

The product configuration has three tiers each with five values:

- Tier 1
  - T1 1-5 customers
  - T1 6-25 customers
  - T1 26-100 customers
  - T1 101-250 customers
  - T1 >250 customers
- Tier 2
  - T2 1-10 customers
  - T2 11-100 customers
  - T2 101-250 customers
  - T2 251-500 customers
  - T2 >500 customers
- Tier 3
  - T3 1-50 customers
  - T3 51-250 customers
  - T3 251-500 customers
  - T3 501-750 customers
  - T3 >750 customers

- The **Remove** button highlights the selected row (in red) to indicate that it has been marked for removal from the table in the ERT Override dialog. Rows are not removed until the **OK** button has been clicked.
- The **OK** button applies any actions taken, with the following exceptions:
  - If the ERT Override table contains more than one row for the same zone, an error dialog will appear and no changes will be saved. I
  - If another user enters an ERT override while you have the dialog open, the system will block the update and display an ERT override conflict message that tells you to refresh the data to see the latest values. Once the data has been refreshed, using the Refresh button, you may then modify the ERT override, if still applicable.
- The **Print...** button brings up the Print Preview dialog, which allows you to print out the contents of the ERT Override dialog.
- The **Cancel** button closes the dialog without saving changes, and leaves the accessibility/overrides of the Storm Management estimates as they were.
- The **Refresh** button repopulates the ERT Override dialog with the latest information from the server.

**Note:** Applying overrides to the Storm Management estimates has no effect on events that have a crew onsite or events that have had an ERT manually entered in Oracle Utilities Network Management System. Those events will retain the display of their present manually entered/Storm Management ERT.

The following table describes what occurs when different combinations of ERT Override column and Publish Projections column values are applied.

If...	Then...
The Publish Projections checkbox is checked and you enter a date and time in the ERT Override column for that row...	<p>All events in that control zone will receive that date and time as their default ERT value outside of Storm Management:</p> <p>The ERT Override value displays in the ERT Override field of the Summary Information table along with the word “Published”.</p> <p>The ERT Override value displays for current outages in that control zone in other modules.</p> <p>New outages in that control zone receive the ERT Override value until you turn the override of the Storm Management estimates off.</p>
The Publish Projections checkbox is checked and you did not enter a date and time in the ERT Override column for that row...	<p>Publishing an empty ERT Override value is not a supported operation. Such entries will not be saved.</p> <p>The correct way to hide ERT values is to uncheck Publish Projections checkbox.</p>



If...	Then...
If the Publish Projections checkbox is not checked and a date and time are entered in the ERT Override column for that row...	All events in that control zone will receive a blank value as their default ERT value outside of Storm Management, regardless of whether or not a date and time is entered in the ERT Override column for that row; current and new events display a blank ERT value in other modules until you turn the override of the Storm Management estimates off: The ERT Override value displays in the ERT Override field of the Summary Information table along with the word “Non-Published”.
If the Publish Projections checkbox is not checked and a date and time are not provided in the ERT Override column for that row...	All events in that control zone will receive a blank value as their default ERT value outside of Storm Management, regardless of whether or not a date and time is entered in the ERT Override column for that row; current and new events display a blank ERT value in other modules until you turn the override of the Storm Management estimates off: The ERT Override field in the Summary Information panel contains the word “Non-Published”.

### Turning Off Accessibility of the Estimates

To turn the accessibility of the estimates off, complete these steps:

- Do one of the following:
  - Click the **ERT Override** button on the toolbar, or
  - Select the ERT Override option from the System menu. The ERT Override dialog opens.
- Click the **Add** button to add a new row to the ERT Override table.
- Click into the Zone cell of the new row, and then click the button on the right of the Zone field.
  - The Control Zone Selection dialog opens.
- Select the control zone whose estimates you wish to make inaccessible.
- Click **OK**.
  - The Control Zone Selection dialog closes.
  - The zone you selected populates the Zone field.
- Uncheck the Publish Projections checkbox.
- Click **OK**. Storm Management’s calculated estimates for that control zone are no longer accessible to other Oracle Utilities Network Management System windows and the ERT Override dialog closes.

### Overriding the Estimates

To override the estimates to a default “global” ERT for the events in a zone, complete these steps:

- Do one of the following:
  - Click the **ERT Override** button on the toolbar, or

- Select the **ERT Override...** option from the System menu. The ERT Override dialog opens.
2. Press the **Add** button to add a new row to the ERT Override table.
3. Click into the Zone cell of the new row, and then click the button on the right of the Zone field.
  - The Control Zone Selection dialog opens.
4. Select the control zone whose estimates you wish to make inaccessible and click **OK**.
  - The Control Zone Selection dialog closes.
  - The zone you selected populates the Zone field.
5. Click into the ERT Override cell of the new row, and then click on the Calendar button.
6. Select a date and time for the new default ERT. Click **OK** on the Calendar dialog to close it.
7. Click out of the ERT Override cell and into a different cell to ensure the ERT Override time is saved.
8. Make sure the Publish Projections checkbox is checked.
9. Click **OK**. Storm Management's calculated estimates for that control zone are no longer displayed to other modules; the provided ERT Override value is displayed instead. The ERT Override dialog closes.

### Changing Publish/Non-Publish or Default ERT Information

If you have the accessibility of the Storm Management estimates turned off, you can revise the default ERT, or you can change from publishing the default ERT to not publishing it or vice versa, without having to first turn the accessibility back on. To do this, complete these steps:

1. Do one of the following:
  - Click the **ERT Override** button on the toolbar, or
  - Select **ERT Override...** option from the System menu. The ERT Override dialog opens.
2. If you want to update the ERT Override for a zone, click into the ERT Override cell of the applicable row, click on the Calendar button.
3. Select a date and time, then click **OK**.
4. Click out of the ERT Override cell and into a different cell to ensure the ERT Override time is saved.
5. Check or uncheck the Publish Projections checkbox for the applicable row.
6. Click **OK**. The following occurs:
  - The ERT Override dialog closes.
  - The default ERT is published and/or revised if the Publish Projections checkbox was checked, or
  - The default ERT is not published if the Publish Projections checkbox was not checked.

### Turning Accessibility of Projections Back On/Removing Overrides

To turn the accessibility of the Storm Management estimates back on and/or remove ERT Overrides, complete these steps:

1. Do one of the following:
  - Click the **ERT Override** button on the toolbar, or
  - Select the **ERT Override...** option from the System menu. The ERT Override dialog opens.

2. Select the row that corresponds to the zone for which you want to turn the accessibility of estimates back on/remove the applied ERT Override.
3. Press the <Esc> key on your keyboard.
4. Click **Remove**.
5. Repeat previous steps as needed.
6. Click **OK**. The following occurs:
  - All eligible events immediately receive the most recently calculated Storm Management estimates.
  - If all rows have been removed from the ERT Override table, the status bar indicates ERT Override is off.

### Printing ERT Overrides

To print the contents of the ERT Override dialog, complete these steps:

1. Do one of the following:
  - Click the **ERT Override** button on the toolbar, or
  - Select the **ERT Override...** option from the System menu. The ERT Override dialog opens.
2. Click the **Print...** button. The Print Preview dialog opens.
3. Adjust the scale, orientation, and page setup as desired.
4. Click the **Print** button on the toolbar to print the page(s). The Print Preview dialog disappears and the print output appears at your selected printer.

### Manual Overrides

It may occur that the actual averages are significantly different from the historical averages. The % Change row of the Storm Report lets you temporarily manually override each category of the historical averages. The percentage you enter changes the lookup values used in the calculation of the estimates. This functionality is only available when the currently selected control zone is at the simulation level.

### Overriding Historical Averages

To override the historical averages, complete these steps:

1. Make sure the currently selected control zone is at the simulation level.
2. Click in the cell of the % Change row for the column of the corresponding historical average category you want to change.
3. Revise the percentage in the cell to the value you want to use.
4. Click **Enter**.
5. Click the **Save** button on the toolbar or select Save from the System menu. The historical averages in the column immediately update to reflect the change.

Storm Management will use the modified values when recalculating estimates during the next scheduled simulation iteration. The modified values stay in place until you manually change the % Change row back to 100% or, if applied during storm mode, you exit storm mode. The historical averages are not changed in the database.

## Using Storm Mode

Storm mode is useful during and after a storm or other high volume outage period. In this mode, the estimate calculations factor in crew availability.

Once a crew arrives onsite at an event, the Storm Management estimate calculation will then use the actual crew arrival time rather than the projected arrival time. The estimate calculation can adjust again when a crew reports an estimated repair time based upon observed field conditions.

This section includes the following topics:

- **Entering Storm Mode**
- **Using Define Storm Dialog**
- **Placing a Control Zone in Storm Mode and Defining the Storm Information**
- **Joining Existing Storms**
- **Joining a Control Zone to an Existing Storm**
- **Changing Storm Levels**
- **Changing Storm Types**
- **Forecasting Outages**
- **Using Forecast Profiles**
- **Working with Crew Information**
- **Exiting Storm Mode**

## Entering Storm Mode

To enter storm mode for a control zone, complete these steps:

1. Do one of the following:
  - Select **Toggle Storm Mode** from the System menu, or
  - Click the **Toggle Storm Mode** button on the toolbar.

The Define Storm dialog opens. Enter the storm data.

2. Click the **Ok** button.

**Note:** You can only enter storm mode from real-time mode. Once in storm mode, you can switch to study mode.

## Using Define Storm Dialog

The Define Storm dialog opens once you toggle to storm mode. You must enter information about the storm before Storm Management will change modes. The information you provide here is used to populate parts of the Storm Information section of the window.

The Define Storm dialog displays the following fields and buttons:

- The **Zone** field displays the Name of the currently selected zone. This control zone and all of its children that aren't already in storm mode will be placed into storm mode as a part of this storm. This field is not editable.
- The **Storm Name** field allows you to enter the name of the storm. This value is used in conjunction with the current date as the unique identifier of the storm. If this field is not populated when you click the **OK** button, an error appears. Click **OK** to close the message and correct the error.
- **Special Condition** is a drop-down menu of storm types that indicate a pre-defined condition existing with the storm. This condition may also dictate a different set of historical average values be used in the estimate calculations made by the system.
- **Storm Level** is a drop-down menu of severity levels for the storm. This value is recorded for information and reporting purposes only and has no effect on the estimate calculations.

- **Start Date** is the date and time at which the storm started. When you uncheck the “Use current time” option, the button on the right of this field opens a calendar that enables you to select the date and time. Valid dates and times are those prior to (and including) the current time. If your entry is invalid, an error message appears. Click **OK** to close the message and correct the error.
- The **Use Current Time** checkbox is selected by default. This option allows you to leave the Start Date field blank and have the current system time on the server be used as the Start Date of the storm. Deselecting this option enables the calendar button to the right of the Start Date field.
- The **Ok** button saves the entered storm information and closes the dialog. Storm Management is now operating in storm mode for the corresponding control zone(s).
- The **Cancel** button discards the entered storm information and closes the dialog without switching the currently selected control zone into storm mode.

## Placing a Control Zone in Storm Mode and Defining the Storm Information

To place a control zone in storm mode and define the storm information, complete these steps:

1. Make sure the desired control zone is selected in the Zone Selection panel, and that the zone is in non-storm mode.
2. Do one of the following:
  - Select the Toggle Storm Mode option from the System menu, or
  - Click the **Toggle Storm Mode** button on the toolbar. The Define Storm dialog opens.
3. Provide information in the Storm Name field.
4. Select a Special Condition from the drop-down list, if desired.
5. Select a Storm Level from the drop-down list, if desired.
6. Select a date and time for the storm’s Start Date. Either:
  - Leave the Use Current Time option checked.
  - Uncheck the Use Current Time option. Click the Start Date calendar button and select a date and time for the storm’s start date. Click **OK**. The calendar closes, and the selected date and time populate the Start Date field.
7. In the Define Storm dialog, click **Ok**. The following occurs:
  - The Storm Information panel appears in between the Zone Selection and Summary Information panels. The Crew Information panel appears below the Zone Selection and Storm Report panels.
  - Storm Management operates in storm mode for the selected control zone.
  - If the selected control zone has any child zones not already operating in storm mode, the child zones operate in storm mode as part of this same storm.

**Note:** If your system has a control zone set up directly beneath the top-level control zone to contain all of the fuzzy events in the system, that fuzzy control zone cannot be placed into storm mode. That fuzzy zone will only go into storm mode when its parent zone is placed into storm mode.

## Joining Existing Storms

If you try to place a control zone into storm mode and either: 1) there are other control zones at the same level that are already operating in storm mode, or 2) the selected zone has children that are currently operating in storm mode, then the Define Storm dialog opens with a Join Existing Storm panel. This panel gives you the option of adding the currently selected control zone to an existing storm rather than creating a separate new one.

The Join Existing Storm panel lists the existing storms that the selected control zone can be added to. When you select a storm from the list, the Storm Details section of the dialog populates with the information that pertains to the selected storm, and then the only editable field is the Start Date.

The Join Existing Storm panel displays the following buttons:

- The **Clear Selection** button deselects the storm in the list and reverts the fields of the Storm Details section back to their default, editable values. This button is only enabled when an existing storm is selected from the list.
- The **Ok** button saves the entered storm information and closes the dialog. Storm Management is now operating in storm mode for the corresponding control zone(s).
- The **Cancel** button discards the entered storm information and closes the dialog without switching the currently selected control zone into storm mode.

## Joining a Control Zone to an Existing Storm

To join a control zone to an existing storm, complete these steps:

1. Make sure the desired control zone is selected in the Zone Selection tree, and that the zone is in non-storm mode.
2. Do one of the following:
  - Select the Toggle Storm Mode option from the System menu, or
  - Click the **Toggle Storm Mode** button on the toolbar. The Define Storm dialog opens with the Join Existing Storm panel displayed.
3. In the Join Existing Storm panel, select the storm you want the selected zone to join.
4. Select a date and time for the storm's start date using one of the methods below:
  - Leave the Use Current Time option checked. The current system time on the server will be used as the Start Date of the storm in this control zone.
  - Uncheck the Use Current Time option. The Start Date of the storm you selected to join will be used as the Start Date of the storm in this control zone, unless you explicitly edit it.
  - To then edit the Start Date, click on the Start Date **calendar** button and select a date and time for the storm's start date. Click **OK**. The calendar closes, and the selected date and time populate the Start Date field.
5. In the Define Storm dialog, click **Ok**. The following occurs:
  - The Storm Information panel appears in between the Zone Selection and Summary Information panels. The Crew Information panel appears below the Zone Selection and Storm Report panels.
  - Storm Management operates in storm mode for the selected control zone.
  - If the selected control zone has any child zones not already operating in storm mode, the child zones operate in storm mode as part of this same storm.

**Note:** If all of the children of a zone are eventually placed under the same storm individually with the Join Existing Storm panel, the parent zone is automatically placed into storm mode when the last child zone is joined to that storm. The parent zone adopts the earliest Start Date of all of its children.

## Changing Storm Levels

The Storm Level value is recorded for information and reporting purposes only and has no effect on the estimate calculations.

To change the Storm Level selection, complete these steps:

1. Make sure the currently selected control zone is at the simulation level and operating in storm mode.
2. In the Storm Information panel, select the new storm type from the Storm Level drop-down menu.
3. Click the **Save Changes** button or select the Save Changes option from the System menu.
  - Any child zones of the currently selected zone that are also part of this same storm will receive the new storm level as well.

## Changing Storm Types

The storm type listed in the Special Condition drop-down menu is linked to a specific set of historical average values. If the characteristics of a zone's storm change, you can change the Special Condition value and have the system use a new set of historical average values in its estimate calculations for that zone.

To change the Special Condition storm type, complete these steps:

1. Make sure the currently selected control zone is at the simulation level and operating in storm mode.
2. In the Storm Information panel, select the new storm type from the Special Condition drop-down menu.
3. Click the **Save Changes** button or select **Save Changes** from the System menu.
  - The Storm Report panel immediately repopulates with the historical averages for the new storm type.
  - Any child zones of the currently selected zone that are also part of this same storm will receive the new storm type as well.
  - Storm Management will use the historical average values that apply to the new storm type when recalculating estimates for events in that control zone, as well as its child zones that belong to the same storm, during the next scheduled simulation iteration.

## Example of Changing Storm Types

For example, the Branch level of the control zone hierarchy is the simulation level. A Wind/Rain storm was defined for the Stark branch zones, which includes the Lake, Alliance, and Massillon zones. However, the temperature in the Alliance zone was cold enough for ice to form. The Special Condition in the Stark zone is set to Wind/Rain storm, so estimates being calculated for Alliance could be inaccurate due to the increased travel time involved in the icy conditions observed there.

If you change Special Condition in the Alliance zone to Ice, the historical value averages in the Storm Report repopulate with values appropriate for an ice storm. When the next scheduled simulation iteration occurs, the events in the Alliance zone receive estimates calculated using the historical averages for Ice, while the events in all other control zones in the Stark region continue to receive estimates calculated using the historical averages for Wind/Rain.

## Forecasting Outages

Outage forecasting takes into account future storm load. It provides more accurate estimated restoration projections in the early stages of a storm by simulating the expected impact of the storm. Outage forecasting can be performed in a control zone at the simulation level currently operating storm mode.

## Forecasting Outages by Percentage

To perform outage forecasting by percentage, complete these steps:

1. Make sure the Forecast Mode field in the Storm Report panel is set to % Change, and the current control zone is at the simulation level.
2. Click in the % Change cell beneath the Actual Outages column.
3. Revise the percentage in the cell to the value you want to use. This value must be greater than or equal to 100%.
4. Press **Enter**.
5. Click the **Save Changes** button on the toolbar or select **Save Changes** from the System menu. The following occurs:
  - The value in the Actual Outages column for each outage category is multiplied by the percentage in the % Change row and the result is displayed in the Total Outages column for each outage type. If any outage type currently has an Actual Outages value of 0, then 0 will remain displayed in the Total Outages column until at least one event of that outage type appears.
  - New outages that enter the system reflect the forecasting percentage and update the Total Outages column accordingly.
  - During the next scheduled simulation, the Storm Management estimates calculation takes into account the increased outage percentage. The modified percentage stays in place until the value in the % Change row is changed back to 100 or until storm mode is exited for the control zone.

### Forecasting Outages by Value

The Total Outages column of the Storm Report is a calculated column containing the number of total forecasted outages for each outage type. When the currently selected control zone is at the simulation level and operating in storm mode, you can override the value of this column by editing individual cells within the column.

To perform outage forecasting by value, complete these steps:

1. Make sure the Forecast Mode field is set to Value and the current control zone is at the simulation level.
2. Click in the cell beneath the Total Outages column for the Outage Type whose value you wish to forecast.
3. Enter the new value.
4. Click **Enter**.
5. Click the **Save Changes** button on the toolbar or select **Save Changes** from the System menu. The following occurs:
  - The Total cell value beneath the Total Outages column updates to reflect the new sum using the modified forecast values.
  - During the next scheduled simulation, the Storm Management estimates calculation takes into account the increased number of outages.
  - As new outages enter the system, the Total Outages column stays the same until the number of Actual Outages for an outage type exceeds the number of total outages. Once that occurs, Value forecasting is no longer applied to that outage type.

**Note:** If you enter an invalid value into the Total Outages column, the cell reverts to its previous value when the **Save** button is pressed.

### Using Forecast Profiles

You may want to define and save one or more outage forecasting profiles to be used for analysis and resource planning prior to a storm's occurrence. You can create, edit, delete, and apply forecasting profiles by using the Forecast Profiles window.



This section includes the following topics:

- **Forecast Profiles Window**
- **Adding a Profile**
- **Editing a Profile**
- **Removing a Profile**
- **Applying a Profile**
- **Printing Forecast Profiles**

### **Forecast Profiles Window**

To open the Forecast Profiles window, complete these steps:

1. Make sure the currently selected control zone is at the simulation level.
2. Do one of the following:
  - Select the **Forecast Profiles...** option from the System menu, or
  - Click the **Forecast Profiles** on the toolbar.

The Forecast Profiles window displays the following fields and buttons:

- The **Add Profile** button adds a new default row to the table in the Forecast Profiles dialog. That default row may then be edited to contain the desired profile name and outage type values. If a row marked for removal is selected, pressing the Add Profile button will undo the removal mark. New, unsaved rows display in the table as green. Edited, unsaved rows display in the table as cyan.
- The **Remove Profile** button marks the selected row for removal from the table in the Forecast Profiles window. Rows marked for removal display in the table as red.
- The **Save Profiles** button saves any new or modified profiles, and any rows marked for removal will be deleted. If the Forecast Profiles table contains more than one row with the same profile name, an error dialog will appear and no changes will be saved.
- The **Profile Name** column contains a unique name for the profile.
- The remaining columns correspond to each Storm Management outage type category. These columns contain the number of outages of that outage type that comprise the forecast profile.

#### **Buttons**

- The **Apply Profile** button applies the selected forecast profile values into the Total Outages column of the Storm Report panel.
- The **Print...** button brings up the Print Preview dialog, which allows you to print out the contents of the Forecast Profiles dialog.
- The **Cancel** button closes the dialog without saving changes, and leaves the forecast profiles as they were.

### **Adding a Profile**

To add a new outage forecasting profile:

1. Do one of the following:
  - Click the **Forecast Profiles** button on the toolbar, or
  - Select **Forecast Profiles** from the System menu. The Forecast Profiles dialog opens.
2. Click the **Add Profile** button to add a new row to the Forecast Profiles table.
3. Click into the Profile Name cell of the row and specify a unique name for this profile.
4. Click in the desired outage type cells of the row and specify a number of outages.

5. Click the **Save Profiles** button. The Forecast Profiles dialog closes and the new profile is saved for later use.

### Editing a Profile

To edit an existing outage forecasting profile:

1. Do one of the following:
  - Click the **Forecast Profiles** button on the toolbar, or
  - Select **Forecast Profiles** from the System menu. The Forecast Profiles dialog opens.
2. Click into the desired cell of the desired forecast profile and modify the profile name/outage type count.
3. Click the **Save Profiles** button. The Forecast Profiles dialog closes and the edited profile is saved for later use.

### Removing a Profile

To remove an existing outage forecasting profile:

1. Do one of the following:
  - Click the **Forecast Profiles** button on the toolbar, or
  - Select the Forecast Profiles option from the System menu. The Forecast Profiles dialog opens.
2. Click into the any cell of the forecast profile to be removed.
3. Press the <Esc> key on your keyboard.
4. Click the **Remove Profile** button.
5. Click the **Save Profiles** button. The Forecast Profiles dialog closes and the marked profile is removed.

### Applying a Profile

To apply an outage forecasting profile:

1. Do one of the following:
  - Click the **Forecast Profiles** button on the toolbar, or
  - Select **Forecast Profiles** from the System menu. The Forecast Profiles dialog opens.
2. Click into the any cell of the forecast profile to be applied.
3. Click the **Apply Profile** button. The Forecast Profiles dialog closes, and the Total Outages column of the Storm Report for each outage type is now populated with the corresponding value from the forecast profile.
4. Click the **Save Changes** button. The Total cell value beneath the Total Outages column updates to reflect the new sum using the modified forecast values. For any outage type where the Actual Outages value exceeds the forecasted value, the Total Outages column for that outage type will instead display the Actual Outages value rather than the forecasted value.

### Printing Forecast Profiles

To print the contents of the Forecast Profiles dialog, complete these steps:

1. Do one of the following:
  - Click the **Forecast Profiles** button on the toolbar, or
  - Select **Forecast Profiles...** from the System menu. The Forecast Profiles dialog opens.
2. Click the **Print...** button. The Print Preview dialog opens.

- Adjust the scale, orientation, and page setup as desired.
- Click the **Print** button on the toolbar to print the page(s). The Print Preview dialog disappears and the print output appears at your selected printer.

## Working with Crew Information







Storms create critical outage situations that make it vital to account for crew resources. For example, you may need to move a crew to a different control zone depending on the backlog of outages within each zone.

### Crew Information Pane

The Crew Information pane lists all of the crews identified in Storm Management for the currently selected control zone and its children. Crews of certain skill and availability within a control zone are grouped together. Each row in the Crew Information table represents a group of crews.

### Crew Information Toolbar

The Crew Information pane provides toolbar action buttons:

Button	Description
 <b>Add Crew...</b>	The <b>Add Crew...</b> button opens the Add Crew Group dialog, which lets you define new crew groups for the Crew Information table.
 <b>Edit Crew...</b>	The <b>Edit Crew...</b> button opens the Edit Crew Group dialog, which lets you change crew data for a selected crew group in the Crew Information table.
 <b>Delete Crew...</b>	The <b>Delete Crew...</b> button removes the selected crew group from the Crew Information table. A warning dialog opens, prompting you for confirmation before deleting.
 <b>Move Crew...</b>	The <b>Move Crew...</b> button opens the Move Crew Group dialog, used to transfer crews from the selected crew group in the Crew Information table to another control zone.
 <b>Apply Crew Change...</b>	The <b>Apply Crew Changes</b> button saves changes made in the Crew Information table. Unapplied changes in the Crew Information table are highlighted in different colors.
 <b>Import Crews...</b>	The <b>Import Crews...</b> button opens the Import Crews dialog. In real-time mode, this dialog lets you import crews from Oracle Utilities Network Management System Trouble Management into the Crew Information table. In study mode, it additionally lets you import crew group information from the real-time session or the applied manual override or outage forecasting parameters from the real-time session into study mode.

### Crew Information Table

The Crew Information panel displays the following fields:

- The **# Crews** column contains the number of crews that belong to the group.

- The **Zone** column contains the name of the control zone that crew group is assigned to.
- The **Company** column contains the name of the company that the crew group works for. This column is for informational purposes and does not affect the outcome of the estimate calculations.
- The **Crew Type** column contains the type of crew within the group. This indicates the type of work performed by the crews. The options here match the crew types defined in the Crew Makeup window of Oracle Utilities Network Management System Trouble Management.
- The **Start Date** column contains the date and time at which each crew in the group is available for work.
- The **End Date** column contains the date and time at which each crew in the group becomes unavailable for work.
- The **Hours On** column contains the length of the shift worked by each crew in the group.
- The **Hours Off** column contains the length of time between shifts worked by each crew in the group (*i.e.*, the number of hours that the each crew in the group has off after completing each shift).

### Hiding the Crew Information Table

You can hide the Crew Information table by clicking the  button in the upper left corner of the pane.

### Sorting the Crew Information Table

You can sort the Crew Information table in ascending or descending order according to any column in the table.


To sort the Crew Information table, click on the column heading of the column you want to sort by. The table sorts in ascending order of the selected column, and an up arrow appears on the column heading, indicating that the sort is ascending.

Click the same heading again to toggle to descending sort order. A down arrow appears, and the table re-sorts.

### Applying Changes

A highlighted row in the Crew Information table indicates that there have been changes entered but not yet saved.

- Green highlighted rows are new rows that are added to the table.
- Cyan highlighted rows are rows that have been edited or updated.

A crew group may have been added, edited, moved or imported, but the changes are not permanent until you click the **Apply Crew Changes** (  ) button on the Crew Information toolbar.

Once you save the changes, the new or changed rows in the Crew Information table are no longer highlighted. If at the time of the application there are rows in the Crew Information table that contain the same data in all of their columns (except the # Crews column), then those rows are combined. The numbers of crews for each row are added together and the sum appears in the # Crews column.


If you try to change the control zone view while there are unsaved changes in the Crew Information table, a dialog prompts you to do one of the following:

- The **Yes** button saves the changes in the Crew Information table and moves to the newly selected control zone.
- The **No** button discards the changes in the Crew Information table and moves to the newly selected control zone.

- The **Cancel** button closes the dialog without altering the changes in the Crew Information table or moving to the selected control zone.

## Importing Crews

The crew information used by Storm Management is maintained separately from that in Oracle Utilities Network Management System Trouble Management. However, crew information defined in Oracle Utilities Network Management System Trouble Management can be imported into Storm Management with the Import Crews dialog.

To open the Import Crews dialog when in storm mode, click the **Import Crews...** () button on the toolbar.

**Note:** Changes made within Storm Management to the imported crews will not affect the data in Oracle Utilities Network Management System Trouble Management.

The Import Crews dialog serves two functions:

- In real-time mode, it lets you import crew information from Oracle Utilities Network Management System Trouble Management into the Crew Information table, based on specified filtering criteria.
- In study mode, it lets you import Oracle Utilities Network Management System Trouble Management crew information, as well as the manual override/outage forecasting parameters of the currently selected control zone and any crew information from real-time mode into study mode.

## Import Crews Window



The Import Crews window contains the following fields and buttons:

- Zone Information
  - The **Current Zone** field displays the name of the currently selected control zone. This field is not editable.
- Import Criteria
  - The **Reset** option, when checked, replaces all crews currently in the Crew Information table with the imported crews. When not checked, the imported crews are added to the existing data in the Crew Information table.
  - The **Real Crews** option is checked by default. This option imports crew information from Oracle Utilities Network Management System Trouble Management. This option is only deselectable in study mode.
  - The **Crew Groups** option, when checked, lets you import the crew groups from the real-time session. This option is only enabled in study mode.
  - The **Parameters** option, when checked, lets you import the outage forecasting and manual overrides from real-time mode for the selected control zone. This option is only enabled in study mode.
- Filters
  - The **Zone** option, when checked, option imports only crews from the specified control zone. The button on the right opens the Control Zone Selection dialog. (In this dialog, select the zone you want and click **OK**.)
  - The **Company** option is only enabled when the Real Crews Import Criteria option is not selected. It imports only the crews with the Company specified in the drop-down list.
  - The **Crew Type** option, when checked, imports only the crews whose type matches the crew type specified in the drop-down list.

- The **Real Crew Status** option, when checked, imports the crews whose status in Oracle Utilities Network Management System Trouble Management matches the status specified in the drop-down list. Available crew status options are On-Shift (crew is active and currently on shift), Off-Shift (crew is active and currently off shift) and Inactive (crew is currently not active). This option is only enabled when the Real Crews Import Criteria is selected.
- The **Import** button imports the crew information and/or outage forecasting and manual override parameters as specified and closes the dialog. In the Crew Information table, the imported data is highlighted and crews with identical parameters are automatically combined into the same group. To confirm the changes and remove the highlighting, click the **Apply Crew Changes** button.
- The **Cancel** button discards the import criteria options and closes the dialog without importing anything.

### How to Import Crews

To import crews, complete these steps:

1. Make sure the currently selected control zone is operating in storm mode.
2. Click **Import Crews...** (  ) on the Crew Information toolbar.
3. Select the import criteria and filters for the crews you want to import.
4. Click **Import**. If an imported crew is not an identical match to any existing crew group rows in the Crew Information table, then it's added to the table as a new row and highlighted in green. If an imported crew is an identical match to any existing crew group rows in the Crew Information table, then the number of crews in the existing crew group row is incremented and the row is highlighted in cyan.
5. To apply the changes, click the **Apply Crew Changes** (  ) button on the toolbar.


### Example of Importing Crews

The highlighted rows in the Crew Information table below show the results of importing crews into real-time without using the Reset option. The Hours On and Hours Off values default to 8 and 16 respectively for any crew information imported from Oracle Utilities Network Management System Trouble Management.

- Green highlighted rows are new rows that are being added to the table.
- Cyan highlighted rows are crew groups that are having crews added to them. The # Crews column has been increased to reflect the new number of crews in the group.

**Note:** The End Date column is not populated because there is no corresponding value defined in Oracle Utilities Network Management System Trouble Management.

### Adding Crew Groups

You can add new crew groups to Crew Information table using the **Add Crew** dialog. To open the **Add Crew** dialog, click the **Add Crew...** (  ) button on the toolbar.

- **Details Pane**
  - The **Zone** field is the control zone that the crew group is assigned to. The default value is the control zone that Storm Management is currently viewing. The button on the right opens the Control Zone Selection dialog. (In this dialog, click on the zone you want and click **OK**.)
  - The **Company** drop-down menu is the name of the company that the crew group works for. This column is for informational purposes and does not affect the outcome of the estimate calculations.

- The **Crew Type** drop-down menu is the type of crew within the group. This indicates the type of work performed by the crews. The options here match the crew types defined in the Crew Makeup window of Oracle Utilities Network Management System Trouble Management.
- The **# Crews** field allows you to specify the number of crews that belong to the group.
- **Schedule**
  - The **Start Date** field is the date and time at which each crew in the group is available for work. The button on the right opens a calendar dialog to select the date and time from.
  - The **Avail Until** field is the date and time at which each crew in the group becomes unavailable for work. The button on the right opens a calendar dialog to select the date and time from.
  - The **Hours On** field allows you to specify the length of the shift worked by each crew in the group, beginning at the Start Date.
  - The **Hours Off** field allows you to specify the length of time between shifts worked by each crew in the group (*i.e.*, the number of hours that the each crew in the group has off after completing each shift).
  - The **OK** button confirms the details and schedule for the new crew group, inserts the information into the Crew Information table, and closes the dialog. You must save the new crews by clicking the **Apply Crew Changes** button or selecting the Apply Crew Changes option from the Crew menu.
  - The **Cancel** button discards the details and schedule and closes the dialog without inserting any information.

When there is at least one crew in the table, you can display the pop-up menu by selecting and then right-clicking a row in the Crew Information table.

- The **Copy Crew** option copies the selected row in the Crew Information table.
- The **Paste Crew** option inserts the copied crew into the Crew Information table below the current line.
- The **Add Crew** option inserts a new row into the Crew Information table containing default values. Once the new row is added, you can change the values in each column.



### Adding Crew Groups with the Right-Click Pop-Up Menu

You can add crews directly in the Crew Information table by using the right-click pop-up menu. To do this, complete these steps:

1. Right-click in the Crew Information table. The options menu appears, with the **Add Crew** option enabled.
2. Select **Add Crew**. A new row appears in the Crew Information table with the default values, highlighted in green.


### Editing Crew Groups Using Edit Crew

Once you have imported or added crew groups, you can modify the details of a crew group. Modify crew information using the Edit Crew Group dialog.

1. Click the **Edit Crew...** (  ) button on the toolbar to open the Edit Crew Group dialog. The Edit Crew Group dialog contains the same fields as the Add Crew Group dialog. The fields are populated with data from the selected row of the Crew Information table.
2. Modify the crew as necessary and click OK to update the Crew Information table.
3. To apply the modifications, click the **Apply Crew Changes** (  ) button.


### Editing Crew Groups within the Crew Information Table

You can also edit crews directly in the Crew Information table. To do this, complete these steps:

1. Click the cell of the row that you want to edit. Depending on the type of data in the cell, one of the following occurs:
  - A cursor appears within the cell.
  - A calendar dialog opens for you to select a new date and/or time.
  - A Control Zone Selection dialog opens.
  - A drop-down list opens.
2. Make changes by either editing the value in the cell or selecting from the dialog or drop-down list. (In the Control Zone Selection dialog, click on the zone you want and click **OK**. In the calendar dialog, select a new date and/or use the spinners to set a new time.). The edited row becomes highlighted in cyan.
3. Click **Apply Crew Changes** (  ). The following occurs:
  - Your edits are saved.
  - The row is no longer highlighted.
  - The changes are used during the next scheduled simulation iteration.

### Deleting Crew Groups

To delete a crew group from the Crew Information table, complete these steps:


1. Select the crew group in the Crew Information table.
2. Click the **Delete Crew** (  ) button .

A message box opens, requesting confirmation that the selected crew group should be permanently deleted.
3. Click **Yes** to confirm the delete. The crew group disappears from the Crew Information table.

**Note:** the **No** button cancels the delete.

### Moving Crew Groups to a Different Control Zone

Each crew group is assigned to a specific control zone when it is created. During your analysis, you may want to adjust your crew resource allocation by reassigning crews to different control zones. The Move Crew Group dialog enables you to move all or part of the crews within a selected crew group to different control zones.

To open the Move Crew Group dialog, select a crew group from the Crew Information Table and click the **Move Crew...** (  ) button. The Move Crew Group window contains the following fields and buttons:

- The **Company** field displays the name of the company that the crew group works for. This field is not editable.
- The **Crew Type** field displays the type of crew within the group. This indicates the type of work performed by the crews. It matches the crew types defined in the Crew Makeup window of Oracle Utilities Network Management System Trouble Management. This field is not editable.
- The **From Zone** field displays the current control zone of the selected crew group. This field is not editable.
- The **To Zone** is the control zone that the specified number of crews is moving to. The button on the right opens the Control Zone Selection dialog. (In this dialog, click on the zone you want and click **OK**.)




- The **# Crews** field allows you to specify the number of crews within the selected crew group to move to the new control zone. If you enter a number greater than the number of existing crews, an error will occur when you click **OK**.
- The **OK** button confirms the details of the move and closes the dialog. If all of the crews in a group are being moved, the original crew group row now appears highlighted in cyan with the control zone modified. If only part of the crews is being moved from a crew group, the original group row is now highlighted in cyan with the number of crews decreased appropriately. A new crew group row appears highlighted in green with the number of specified crews to move and new control zone (all other fields in the row are the same as the original crew group).
- The **Cancel** button discards the details about the move and closes the dialog without saving any information.

To move crews, complete these steps:

1. Select a crew group row in the Crew Information Table.
2. Click the **Move Crew...** ( ➡ ) button. The Move Crew Group dialog opens.
3. Click the zone selection button on the right of the To Zone field. The Control Zone Selection dialog opens.
4. Select the control zone you want to move the crews to and click **OK**. The Control Zone Selection dialog closes, and the zone you selected populates the To Zone field.
5. If you only want to move part of the crews in the group, enter the number of crews you want to move in the # Crews field.
6. Click **OK**. The dialog closes.


If all of the crews in a group are being moved, the original crew group row now appears highlighted in cyan with the control zone modified.

If only part of the crews is being moved from a crew group, the original group row is now highlighted in cyan with the number of crews decreased appropriately. A new crew group row appears highlighted in green with the number of specified crews to move and new control zone (all other fields in the row are the same as the original crew group).

7. Click **Apply Crew Changes** (  ). The following occurs:
  - The crew groups are moved to their assigned control zones.
  - The modified rows are no longer highlighted.
  - The updated information is used during the next scheduled simulation iteration.


### Moving Entire Crew Groups Using the Table Edit Features

You can also move a crew group by clicking directly in the Zone field of the crew group row and changing the control zone. To move a crew group in this way, complete these steps:

1. Click in the Zone field for the crew group you want to move. The row becomes selected, and the Control Zone Selection dialog appears.
2. Select the zone you want to move the crew group to and click **OK**.
3. Click in a different field of the row. The Zone field updates to reflect the zone you just selected, and the row becomes highlighted in cyan.
4. Click **Apply Crew Changes** (  ). The modified row moves to its new control zone and is no longer highlighted. The updated information is used during the next scheduled simulation iteration.

### Moving Partial Crew Groups Using the Right-Click Pop-Up Menu

You can also move partial crew groups directly from the Crew Information table. To do this, complete these steps:

1. Select a crew group row in the Crew Information Table.
2. Copy a selected crew group using the right-click Copy Crew option.
3. Paste it as a new row in the table using the right-click Paste Crew option.
4. Edit the Zone cell in the new row by clicking on it, selecting the new control zone and clicking **OK**.
5. Edit the # Crews cell in the original row.
6. Edit the # Crews cell in the new row.
7. Click **Apply Crew Changes** (). The following occurs:
  - The new row moves to its assigned control zone.
  - The modified rows are no longer highlighted.
  - The updated information is used during the next scheduled simulation iteration.

### Exiting Storm Mode

To exit storm mode for a selected control zone, do one of the following:

- Select the Toggle Storm Mode option from the System menu, or
- Click the **Toggle Storm Mode** button on the toolbar.

These options are only available if the currently selected control zone is operating in real-time mode and storm mode.

### Define Storm Dialog

Once you press the Toggle Storm Mode, the Define Storm dialog opens, prompting you for the End Date of the storm in this zone.

The Define Storm dialog displays the following fields:

- The **Zone** field displays the name of the currently selected zone. This control zone and all of its children that aren't already in non-storm mode will be placed into non-storm mode, ending the storm in this zone(s). This field is not editable.
- The **Storm Name** field displays the name of the storm. This field is not editable.
- The **Special Condition** field displays a storm type that indicates a pre-defined condition existing with the storm. This condition may also dictate a different set of historical average values be used in the estimate calculations made by the system. This field is not editable.
- The **Storm Level** field displays the severity level for the storm. This value is recorded for information and reporting purposes only and has no effect on the estimate calculations. This field is not editable.
- The **Start Date** field displays the date time at which the storm started in this zone. This field is not editable.
- The **End Date** field contains the date and time at which the storm ended in this zone. When you uncheck the "Use current time" option, the button on the right of this field opens a calendar that lets you select the date and time. Valid dates and times are those prior to (and including) the current time. If your entry is invalid, an error message appears. Click **OK** to close the message and correct the error.
- The **Use Current Time** checkbox is selected by default. This option allows you to leave the End Date field blank and have the current system time on the server be used as the End Date

of the storm in this zone. Deselecting this option enables the calendar button to the right of the End Date field.

### Setting the Storm End Date

To set the storm's end date, complete these steps:

1. Select a date and time for the storm's end date. Either:
  - Leave the Use Current Time option checked.
  - Uncheck the Use Current Time option. Click on the End Date calendar button and select a date and time for the storm's end date. Click **OK**. The calendar closes, and the selected date and time populate the End Date field. Valid dates are those between the start date and time of the storm and the current date and time.
2. Click the **Ok** button on the Define Storm dialog.
  - Storm Management returns to non-storm mode for the selected control zone.
  - If the control zone had any child zones in the same storm, the child zones are also returned to non-storm mode.

**Note:** The **Cancel** button discards the End Date without saving it. The Define Storm dialog closes and the currently selected control zone stays in storm mode.

## Using Study Mode

Study mode enables you to manipulate parameters that affect the estimate calculations, such as outage forecasting, manual overrides and crew information, without altering the current real-time calculations. The Storm Management window appears below in study mode.

This section includes the following topics:

- **Entering Study Mode**
- **Calculating Crew Resources**
- **Importing Crews and Parameters**
- **Exporting Crews and Parameters**
- **Calculating Estimates in Study Mode**
- **Exiting Study Mode**

### Entering Study Mode

To toggle between study mode and storm mode, do one of the following:

- Select **Toggle Study Mode** from the Storm menu, or
- Click the **Toggle Study Mode** button on the toolbar.

You can only enter study mode from a control zone that is currently in storm mode.

The first time you enter a study session, several portions of the Storm Management window are not populated as they were in the real-time session:

- The Summary Information table's Est Assessed By and Est Restored By columns are empty.
- The Storm Report table's Total Time to Assess and Total Time to Restore columns display zeros.
- The Storm Report table's Estimated Assessed By and Estimated Restored By columns are empty.
- Outage forecasting parameters that existed in the real-time session are not applied.

- Manual overrides that existed in the real-time session are not applied.
- The Crew Information table is empty.
- The Last Update field of the status bar does not contain a time.

Once you create a study session, it remains active throughout the storm. You may find a need to toggle between study and real-time modes repeatedly during a storm. Each time you re-enter study mode, Storm Management loads the saved data saved from the most recent visit to the study session.

The status bar at the bottom of the Storm Management window identifies the current operating modes, as shown below for study, storm mode.

When in study mode, the window's refresh interval is disabled, and estimate calculations using the data in the study mode session must be triggered manually. However, the system does continue to make real-time estimate calculations for all control zones.

## Calculating Crew Resources

In storm mode, Storm Management can calculate the approximate number of crews that the system requires to complete assessment and restoration in the currently selected control zone by a specified date. You can enter variables used in the calculation and see the results in the Calculate Crews dialog.

To open the Calculate Crews dialog, do one of the following:

- Select **Calculate Crews** from the Storm menu when in storm mode, or
- Click the **Calculate Crews...** button on the toolbar.

The Calculate Crews dialog displays the following fields and buttons:

- The Assessment **Desired Date** field contains the assessment completion time you want to achieve. The button on the right of this field opens a calendar that enables you to select a date and time. You must select a date and time later than the current time. The value you enter (and the system uses) displays in the upper left corner above the Used Crews table after the results are calculated. You may leave this field blank if you wish to Calculate Crews for Repair only.
- The Assessment **Work Efficiency (%)** field contains the efficiency of the assessment crews as a percentage. This value affects the amount of work to be completed and is applied along with performance factor values associated with the crew type. You must specify the assessment work efficiency as a percentage between 1 and 100. The value you enter (and the system uses) displays to the right of the Estimated Assessed By date above the Used Crews table after the results are calculated.
- The Repair **Desired Date** field contains the repair completion time you want to achieve. The button on the right of this field opens a calendar that enables you to select a date and time. You must select a date and time later than the current time. The value you enter (and the system uses) displays to the left of the Repair Eff percentage above the Used Crews table after the results are calculated. You may leave this field blank if you wish to Calculate Crews for Assessment only.
- The Repair **Work Efficiency (%)** field contains the efficiency of the repair crews as a percentage. This value affects the amount of work to be completed and is applied along with performance factor values associated with the crew type. You must specify the assessment work efficiency as a percentage between 1 and 100. The value you enter (and the system uses) displays above the right corner of the Used Crews table after the results are calculated.
- The **Hours** field contains the number of hours that equal one crew unit. The results are returned in crew units rounded to the next whole integer. The value entered and used by the calculation displays above the Unused Crews table.

- The **Calculate Crews** button calculates the number of crews based on the specified data. It populates the Used Crews and Unused Crews panels with the results.
- The **Reset** button resets the entries in the Assessment Desired Date and Work Efficiency, the Repair Desired Date and Work Efficiency, and the Crew Unit Hours fields back to their default values.
- The **Print...** button brings up the Print Preview dialog, which allows you to print out the contents of the Calculate Crews dialog.
- The **Cancel** button closes the dialog.
- The **Outage Types** column contains the name of the Storm Management outage type category.
- The **Assessment Units Existing** column contains the number of existing assessment crews units that can assess each outage type by the specified date.
- The **Assessment Units Needed** column contains the number of additional assessment crew units needed to assess each outage type by the specified date.
- The **Assessment Units Total** column contains the total number of assessment crew units needed to assess each outage type by the specified date.
- The **Repair Units Existing** column contains the number of existing repair crews units that can repair each outage type by the specified date.
- The **Repair Units Needed** column contains the number of additional repair crew units needed to repair each outage type by the specified date.
- The **Repair Units Total** column contains the total number of repair crew units needed to repair each outage type by the specified date.
- The **Crew Type** column indicates the type of work performed by the crews. It matches the crew types defined in the Crew Makeup window of Oracle Utilities Network Management System.
- The **Unused Units** column contains the number excess crew units for each crew type that are found to exist by the calculation.

### Calculating Crews Needed to Assess and Restore Outages by a Given Time

To calculate the number of crew units needed to assess and repair all events in the currently selected control zone by a specific time, complete these steps:

1. From a control zone in storm mode, do one of the following:
  - Select **Calculate Crews** option from the Storm menu, or
  - Click the **Calculate Crews...** button on the toolbar.
2. Click on the Assessment Desired Date calendar button.
3. From the calendar dialog, select the date and time you want all assessment completed by and click **OK**.
4. Select the percentage in the Assessment Work Efficiency (%) field and type the percentage you want to use.
5. Click the **Repair Desired Date** calendar button.
6. From the calendar dialog, select the date and time you want all repair completed by and click **OK**.
7. Select the percentage in the Repair Work Efficiency (%) field and type the percentage you want to use.
8. Click the **Calculate Crews** button. Storm Management estimates the number of crew units needed and unused and displays the results in the Used Crews and Unused Crews tables.

### Printing Calculate Crews Results

To print the contents of the Calculate Crews dialog, complete these steps:

1. Do one of the following:
  - Click the **Calculate Crews** button on the toolbar, or
  - Select **Calculate Crews...** option from the System menu. The Calculate Crews dialog opens.
2. Click the **Print...** button. The Print Preview dialog opens.
3. Adjust the scale, orientation, and page setup as desired.
4. Click the **Print** button to print the page(s). The Print Preview dialog disappears and the print output appears at your selected printer.

### Importing Crews and Parameters

In study mode, the Import Crews dialog has additional options not available in real-time mode. It enables you to import Oracle Utilities Network Management System Trouble Management crew information, as well as the manual override/outage forecasting parameters of the currently selected control zone and any crew information from real-time mode into study mode.

#### Importing Real-Time Crews and Parameters into the Study Session

To open the Import Crews dialog, click the **Import Crews...** button above the Crew Information table.

The following fields are only activated in study mode:


- The **Crew Groups** option, when checked, enables you to import the crew groups from the real-time session.
- The **Parameters** option, when checked, option enables you to import the outage forecasting and manual overrides from real-time mode for the selected control zone.
- The **Company** option is only enabled when the Real Crews Import Criteria option is not selected. It imports only the crews with the Company specified in the drop-down menu.

Once you click the **Import** button, Storm Management Crew Information panel looks and behaves as it does in real-time mode.


The window below shows how the Crew Information table would look if real-time crew groups are imported with no filters. All of the real-time crews are imported.

#### Importing Real-Time Session Information into the Study Session

To import crews, complete these steps:

1. Make sure the currently selected control zone is operating in study mode.
2. Click **Import Crews...** ()
3. Uncheck the Real Crews option under the Import Criteria section.
4. Check the Crew Groups option under the Import Criteria section.
5. Check the Parameters option under the Import Criteria section.
6. Click **Import**. The following occurs:
  - Any outage forecasting and manual override parameters that exist for this control zone in the real-time session are applied to the Storm Report table, but not yet saved.
  - The Save Changes button in the toolbar becomes sensitized.
  - The Crew Information table is now populated with the crew groups that exist for this control zone in the real-time session. If an imported crew is not an identical match to any

existing crew group rows in the Crew Information table, then it's added to the table as a new row and highlighted in green. If an imported crew is an identical match to any existing crew group rows in the Crew Information table, then the number of crews in the existing crew group row is incremented and the row is highlighted in cyan.

7. Apply the outage forecasting and manual override changes by either:
  - Clicking the **Save Changes** button on the toolbar, or
  - Selecting Save Changes from the System menu.
8. Apply the Crew Info table changes by clicking **Apply Crew Changes** ()

The Crew Information table updates to display only those crews belonging to the currently selected control zone. The crew groups that are removed from the current view are saved in the study session for their appropriate control zones. You can view them by selecting their control zone from the Zone Selection tree.

### Resetting the Current Study Session to Match the Real-Time Session

In the course of working with the study session, the user may want to start over by resetting the state of the study session to the current state of the real-time session.

1. To reset the study session, do one of the following:
  - Click the **Reset Study Session** button on the toolbar, or
  - Select **Reset Study Session** from the Storm menu.

The Reset Study Session confirmation dialog will appear.

2. Click the **Yes** button on the confirmation dialog to proceed. The confirmation dialog closes. The Crew Information table updates with the crews defined in the real-time session. Special Condition, Forecast mode and override information in the Storm Report table are also updated to match the real-time session.

**Note:** This operation affects all control zones, not just the currently selected zone.

### Exporting Crews and Parameters

Once the user is satisfied with the simulation parameters in study mode, the parameters can be exported back into the real-time session.

To export the study session parameters, complete these steps:

1. Do one of the following:
  - Click the **Export Study Session** button on the toolbar, or
  - Select **Export Study Session** from the Storm menu.

The Export Study Session confirmation dialog appears.

2. Click the **Yes** button on the confirmation dialog to proceed. The confirmation dialog closes. The contents of the Crew Information as well as Special Condition, Forecast mode and override information in the Storm Report table are copied into the real-time session.

**Note:** This operation affects all control zones in the real-time session, not just the currently selected zone.

### Calculating Estimates in Study Mode

Because estimate calculations using the data in the study mode session must be triggered manually, you must use the **Force Simulation Run** button to calculate the results.

**Note:** While you are working in study mode, Storm Management continues to calculate restoration times for control zones operating in real-time.

To calculate estimates in study mode, do one of the following:

- Select **Force Simulation Run** option from the System menu, or
- Click the **Force Simulation Run** button on the toolbar.

The Summary Information table and Storm Report table update to display the estimates. The status bar indicates the time at which the forced simulation was last executed in the study session.

**Note:** Each time you make changes in the Storm Management window in study mode, you must press the **Force Simulation Run** button in order to view the results of the changes. Because every time you press the **Force Simulation Run** button causes Storm Management to completely re-analyze and calculate estimates for all events in the system, forcing a simulation could slow down system performance at times. It is recommended you keep forced simulations at a minimum.

When Storm Management completes a forced simulation in real-time mode, a confirmation message is displayed.

**Note:** Once you've found the optimal settings in your study session, you must manually re-enter them into real-time mode to apply them to the storm.

## Exiting Study Mode

To exit study mode, do one of the following:

- Click the **Toggle Study Mode** button on the toolbar, or
- Select **Toggle Study Mode** from the Storm menu.

If there are unsaved changes, a dialog opens prompting you for options to save the changes.

**Note:** You must exit study mode before you can exit storm mode.

# View Only Environment

Some users do not have a need to manipulate the various parameters on the Storm Management window, but rather need to monitor and analyze the information that's presented. The View Only version of the Storm Management window is available for this type of user.

Open the View Only Storm Management window by clicking the Storm Management icon found under the appropriate program group in your Windows Start Menu, or by double clicking the Storm Management icon on your desktop (depending upon how it was installed). The Storm Management Login window will appear.

Login with a User Type of "View Only" to proceed to the View Only window.

## View Only Environment User Interface


### View Only Menus

There are three menus on the View Only Storm Management menu bar: System, Storm, and Help.



## Menu


The options in the System menu are available in both storm and non-storm modes. The following table describes the System Menu options and associated toolbar icons.

Menu Option	Description	Toolbar Icon
Retrieve Update	Refreshes the window with the most recent information from the system.	
Print All...	Opens the Print Preview dialog, which allows you to print out the Summary Information panel, Storm Report panel, Storm Information panel (if present), Crew Information panel (if present), and status bar information from the current Storm Management window.	--
Print Crews...	Opens the Print Preview dialog, which allows you to print out the Crew Information panel from the current Storm Management window. This option is only available in storm mode.	--

## Storm Menu

The option in the Storm menu is only enabled when Storm Management is in storm mode for the selected control zone.

The following table describes the Storm Menu options.

Menu Option	Description	Toolbar Icon
Calculate Crews...	Opens the Calculate Crews dialog, which is used to determine the approximate number of crews needed to complete assessment and repair by a specified date and time.	


## View Only Help Menu


The Help menu options are Storm Management Help, which opens the online help content for Storm Management, and About Storm Management, which displays information regarding the version of the application and the Web Gateway.

## View Only Toolbar

The Storm Management toolbar provides a shortcut to many of the options available from the Storm Management menus.

The View Only Storm Management toolbar displays the following buttons.

- The **Retrieve Update** () button refreshes the window with the most recent information from the system. In most cases, the window refreshes itself on a periodic basis. But, if there are unsaved changes in the Storm Management window at the time the automatic refresh is due to occur, the window will not refresh. Instead, an alert appears in the status bar indicating that an update is available, and the Retrieve Update option must be invoked in order to refresh the window with the new update. This allows you to continue on with your changes and save them first before refreshing.

- The **Calculate Crews** () button opens the Calculate Crews dialog box, which is used to determine the approximate number of crews needed to complete assessment and repair by a specified date. This option is only available in storm mode.

## Storm Administration Environment

Upon completion of a storm (*i.e.*, all of the control zones belonging to the storm have been transitioned back to the non-storm mode of operation), authorized users can change completed storm data with Storm Management's Administration window. Users can view completed storm records and make changes to the control zone, storm type, storm level, and beginning and ending dates of the storm.

You can open the Administration window by clicking the Storm Management icon found under the appropriate program group in your Windows Start Menu, or by double clicking the Storm Management icon on your desktop (depending upon how it was installed). The Storm Management Login window will appear.

Login with a User Type of "Storm Administration" to proceed to the Administration window.

## Administration Environment User Interface Features




### Administration Menus

The Storm Administration environment provides the following menus:

- **Administration System Menu**
- **Administration Help Menu**
- **Administration Logout Menu**

### Administration System Menu

The options in the System menu are available at all times. The following table describes the System Menu options.

Option	Description	Toolbar Icon
Revert Changes	Reloads the most recently saved records from the database.	
Save	Saves any changes made to the table.	
Print...	Opens the Print Preview dialog, which allows you to print out the contents of the Storm Administration table.	

### Administration Help Menu

The Help menu provides links to online help content for Storm Management and information about the application, including release version and the Web Gateway that the application is using.

### Administration Logout Menu

Provides the User Logout option. If you try to exit the window while there are unsaved changes in the table, a dialog prompts you to save changes. Click **Yes** to save the changes in the table and exits the window. Click **No** to discard the changes in the table and exits the window. The **Cancel** button closes the dialog without altering the changes in the table or exiting the window.

## Storm Administration Table

The Storm Administration table displays the following fields and buttons:

- The **Storm Name** column contains the name of the storm as defined in the Define Storm dialog. This field is not editable.
- The **Zone** column contains the name of the control zone affected by this storm. Unless explicitly defined elsewhere in the table, all of the children of the control zone are considered part of this storm as well.
- The **Special Condition** column contains the storm type indicating a pre-defined condition of the storm, as defined in the Define Storm dialog.
- The **Start Date** column contains the date and time when the storm began in the zone, as defined in the Define Storm dialog.
- The **End Date** column contains the date and time when the storm ended in the zone, as defined in the Define Storm dialog.
- The **Storm Level** column indicates the severity of the storm, as defined in the Define Storm dialog.

## Printing The Storm Administration Table

To print the contents of the Storm Administration table, complete these steps:

1. Do one of the following:
  - Click the **Print Preview** button on the toolbar, or
  - Select **Print...** option from the System menu. The Print Preview dialog opens.
2. Adjust the scale, orientation, and page setup as desired.
3. Click the **Print** button to print the page(s). The Print Preview dialog disappears and the print output appears at your selected printer.

## Editing Storm Records

The Storm Administration window has many of the same editing capabilities as Storm Management's Crew Information table. The behavior of the editable field depends on the type of data in the field. When you select a row and click the right mouse button, a pop-up menu opens. The options in the menu enable you to cut, copy, paste, and delete rows in the table.

Pop-up menu options are described below:

- The **Cut Row** option removes the selected row from the table. You can paste the removed row back into the table with the Paste option. The row stays available for pasting until a new row is copied or cut from the table.
- The **Copy Row** option copies the selected row, enabling you to paste it into the table with the Paste option. The selected row that was copied remains in the table.
- The **Paste Row** option inserts the copied or cut row into the table.
- The **Delete Row** option removes the selected row from the table. The removed row cannot be pasted back into the table. To undo a deletion, you must select the Revert Changes option from the System menu to restore the table to its last saved state.

## Example

The steps below show an example of how you can add new data to the Storm Administration window:

1. Select the row in the table that pertains to the storm whose data you want to change.
2. Copy the row and paste it in the table using the right-click menu.

3. Click in the Zone, Start Date, or End Date column. A cursor appears and you can enter new data.
4. Click in the Special Condition or Storm Level column. A drop-down menu appears with a list of eligible choices for you to select from.
5. Click the **Save** button to keep the changes. Storm Management validates the entries. If any of the following conditions is true, an error dialog appears and changes are not saved:
  - A storm has multiple entries for the same control zone.
  - An invalid Start Date or End Date is entered (*i.e.*, Start Date is later than End Date or End Date is earlier than Start Date).
  - A storm has both an entry for a parent control zone and child control zone where the parent zone's Start Date is earlier than the child zone's Start Date. (Having both a parent and child control zone entry for the same storm with different Start Dates would indicate that the child zone was placed into storm mode within Storm Management first, and then later the parent zone was placed into storm mode within Storm Management. The parent zone entry would have to be removed and replaced with entries for each child zone if it's desired to record that one of the children had a later Start Date than the rest of the zones within that parent.).
  - A storm has both an entry for a parent control zone and child control zone where the parent zone's End Date is earlier than the child zone's End Date. (Having both a parent and child control zone entry with different End Dates for the same storm would indicate that the child zone was placed back into non-storm mode within Storm Management first, and then later the parent zone was placed into non-storm mode within Storm Management. The parent zone entry would have to be removed and replaced with entries for each child zone if it's desired to record that one of the children had a later End Date than the rest of the zones within that parent.).

## Understanding Storm Management Calculations

Storm Management enables you to analyze restoration times during high volume outage periods, such as those that occur during and following ice storms, thunderstorms, hurricanes, and other widespread disturbances. It can provide estimated assessment and restoration times for every outage in the system. It calculates estimates by periodically simulating the entire restoration process, taking into account the dynamically changing outage predictions and crew resource allocation. These restoration estimates can be used to manage workloads and prioritize crew assignments.

This section provides a detailed explanation of the algorithms and data Storm Management uses to create estimates. It includes the following topics:

- **How Storm Management Works**
- **Non-Storm Mode Algorithm**
- **Storm Mode Algorithm**

### How Storm Management Works

Storm Management has two basic modes of operation – non-storm and storm mode. The estimate calculation algorithm for each mode is fundamentally the same. For example, both modes use historical averages and simulated restoration calculation/analysis of all unrestored events in the system for the estimate calculation algorithm. However, non-storm mode does not attempt to make crew backlog calculations, making its analysis much simpler.

## Historical Averages

The estimate calculation algorithm uses the following historical average minutes data that applies to the different parts of the restoration process:

- **Average travel time for an assessment crew:** how long it takes a crew that is going out to assess the event to arrive onsite, once en route.
- **Average assessment time:** how long it takes a crew to assess the event, once onsite.
- **Average travel time for a repair crew:** how long it takes a crew that is going out to repair the event to arrive onsite, once en route.
- **Average repair time:** how long it takes a crew to repair/restore the event, once onsite.
- **Average cleanup time:** how long it takes before a crew is ready to move on to their next assignment, once the repair/restoration is complete.

The historical average minutes can be broken down by various factors for further granularity of data:

- Control zone. The area the event is in (*e.g.*, urban vs. rural) may have an affect on how long it takes crews to arrive, and thus you may use different travel times for different control zones.

**Note:** One of the top three levels in the control zone hierarchy is designated as the control zone level at which the historical average minutes data is associated. This control zone level is herein referred to as the *simulation level*. For example, if the second level in the control zone hierarchy – the Region level – was the designated simulation level, that would imply that each region would have its own, possibly unique, set of historical average minutes.

- Outage type. The type of outage (*e.g.*, service outages vs. breaker lockouts) dictates how long it's going to take for repair/restoration, and thus you may use different repair/restore times for different types of outages.
- Shift. The time of day (*e.g.*, afternoon rush hour vs. middle of the night) may have an affect on how long it takes crews to arrive, and/or perform the assessment or repair/restoration, and thus you may use different travel, assessment, and repair/restore times for different shifts.
- Day type. The type of day (weekday vs. weekend vs. holiday) may have an affect on how long it takes crews to arrive, and thus you may use different travel times for different day types.
- Season. The time of year (*e.g.*, winter vs. summer) may have an affect on how long it takes crews to arrive, and/or perform the assessment or repair/restoration, and thus you may use different travel, assessment, and repair/restore times for seasons.
- Storm type. Particular weather conditions (*e.g.*, ice) may have an affect on how long it takes crews to arrive, and/or perform the assessment or repair/restoration, and thus you may use different travel, assessment, and repair/restore times for different types of storms.

## Simulation

To generate estimates, the trouble analysis engine periodically goes through a simulated restoration calculation/analysis of all unrestored events in the system. Any events eligible to be assigned an estimated assessment and restoration time by Storm Management (*i.e.*, the events are of a type that Storm Management is configured to recognize, and they have not been given a manually-entered estimated restoration time from a crew/dispatcher) are sorted in priority order (part of the Storm Management configuration). Then, starting at the top of that list, the simulation begins. The event at the top of the list is examined. The mode of operation that the control zone in which the event resides is checked in order to determine which version of the algorithm is being applied to calculate the Estimated Restoration Time (ERT). The appropriate set of historical average minutes for the event is looked up, using the various characteristics such as control zone, outage type, storm type, and when the assessment and repair/restoration is projected to begin. Those historical averages are then used by the calculation of the appropriate algorithm to generate an estimated assessment time and estimated restoration time for the event.

Once an event has been given its estimates by the Storm Management simulation, it's removed from that priority-sorted list, and then the next event on the list is analyzed the same way, and the process continues on until the last event on the list is removed. When the next simulation period occurs, the process starts all over again. And when it does, the previously calculated estimates for many events may change, due to factors such as some previously unrestored events now being restored, new events of varying priority appearing, crews arriving onsite at various events, some events being given manually-entered estimated restoration times, no crew yet arriving onsite, or to various parameters on the Storm Management window being modified since the last iteration.

### Storm Management Window

Because the engine that generates the estimated assessment and restoration times for each event is a separate process, you do not need to have a Storm Management window open in order for the estimates to be calculated. The main purpose of the Storm Management window is to enable you to monitor and analyze the estimates from overall control zone perspective, and to manipulate several of the parameters that are used to generate the estimates.

Given that it's not required to have a Storm Management window open to generate the estimates, after each periodic calculation of the estimates, the results are not pushed out to the Storm Management windows by the engine. Instead, each Storm Management window that's open has its own timer that it uses to periodically retrieve the latest information from the engine automatically.

### Non-Storm Mode Algorithm

For an event that resides in a control zone that is operating under non-storm mode, the calculation of its estimated assessment and estimated restoration times is as follows:

- Look up the historical average values that pertain to an event with its characteristics.
- Verify whether or not an assessment has already been made for the event (if `JOBS.ACT_ASSESS_TIME` is non-null).

#### **If assessment has been made:**

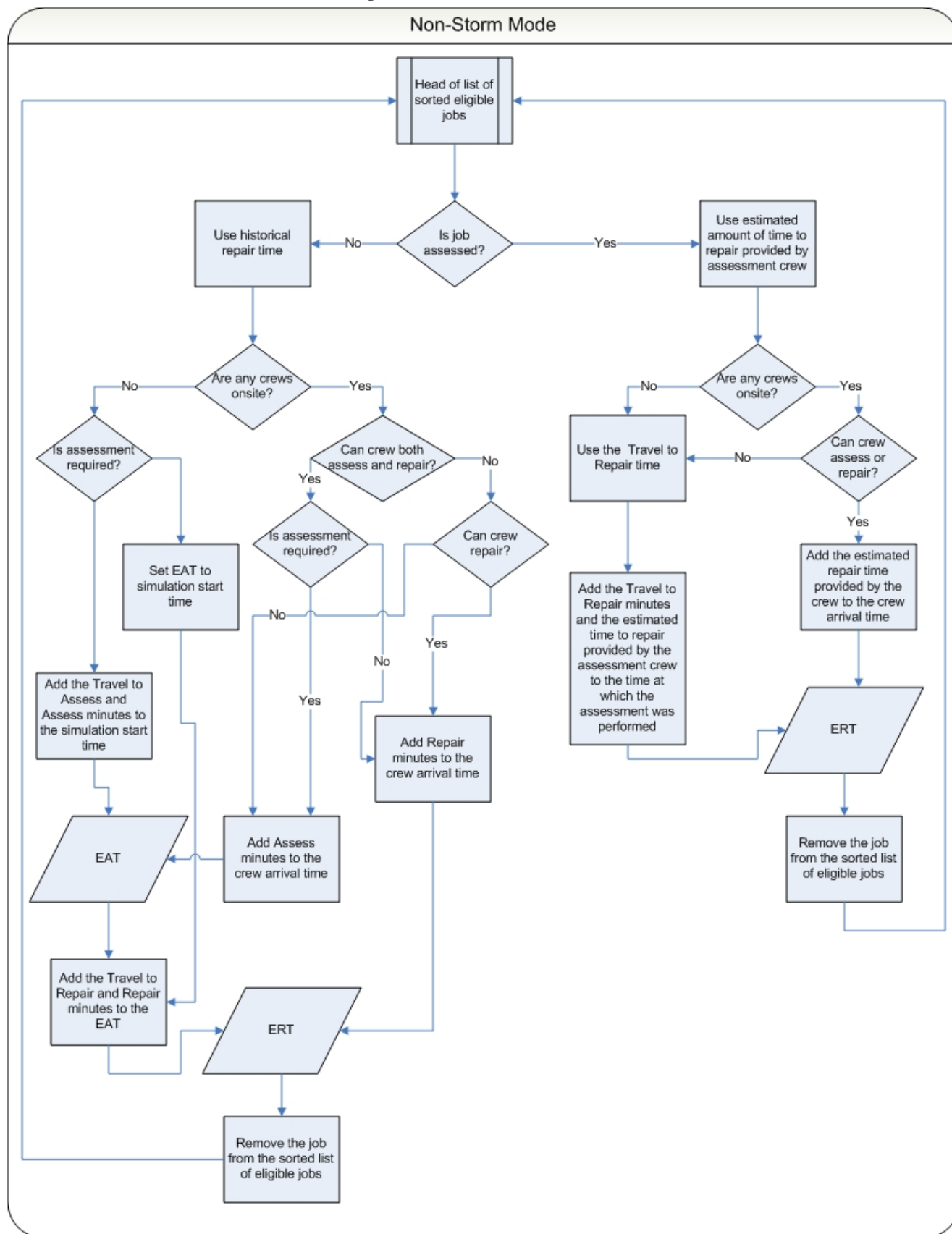
- The repair time assessment provided (`JOBS.EST_REPAIR_MINUTES`) will be used in the calculation rather than the historical Repair average.
- Verify whether or not a crew is currently onsite for this event.
- If a crew is onsite:
  - Check the crew type to verify whether or not this type of crew is one that can repair this event.
  - If crew can repair:
    - It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The actual repair time assessment (`JOBS.EST_REPAIR_MINUTES`) is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event.
  - If crew cannot repair:
    - It is assumed that the onsite crew is there to perform the assessment, and another crew must be sent out to perform the repair. The historical Travel to Repair average and the actual repair time assessment are added to the time at which the repair time assessment was provided (`JOBS.ACT_ASSESS_TIME`) to generate the estimated restoration time (ERT) for the event.
- If a crew is not onsite:
  - The historical Travel to Repair average and the actual repair time assessment are added to the time at which the repair time assessment was provided

(JOBS.ACT\_ASSESS\_TIME) to generate the estimated restoration time (ERT) for the event.

**If no assessment has yet been made:**

- Verify whether or not a crew is currently onsite for this event.
- If a crew is onsite:
  - Check the crew type to verify whether or not this type of crew is one that can both assess and repair this event.
  - If the crew type cannot perform both tasks:
    - Verify if the crew type can repair this event.
    - If crew can repair:
      - It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The historical Repair average is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event.
    - If crew cannot repair:
      - It is assumed that the crew that's onsite is there to perform the assessment. The historical Assess average is added to the time at which the crew arrived onsite to generate the estimated Assessment time (EAT). The historical Travel to Repair and historical Repair averages are added to the estimated Assessment time to generate the estimated restoration time (ERT) for the event.
  - If crew type can perform both tasks:
    - Verify whether or not assessment is required for this event (if Travel to Assess and Assess averages are both 0, assessment is not required).
    - If assessment is not required:
      - It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The historical Repair average is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event.
    - If assessment is required:
      - It is assumed that the crew that's onsite is there to perform the assessment. The historical Assess average is added to the time at which the crew arrived onsite to generate the estimated assessment time (EAT). The historical Travel to Repair and historical Repair averages are added to the estimated assessment time to generate the estimated restoration time (ERT) for the event.
- If a crew is not onsite:
  - Verify whether or not assessment is required for this event (if Travel to Assess and Assess averages are both 0, assessment is not required).
  - If assessment is not required:
    - No estimated assessment time (EAT) needs to be calculated. This historical Travel to Repair and historical Repair averages are added to the simulation to generate the estimated restoration time (ERT) for the event.
  - If assessment is required:
    - The historical Travel to Assess and historical Assess averages are added to the simulation to generate the estimated assessment time (EAT) for the event. The historical Travel to Repair and historical Repair averages are added to the estimated assessment time to generate the estimated restoration time (ERT) for the event.

### Non-Storm Mode Algorithm Flow Chart





In summary, for an event that's in a control zone operating under non-storm mode:

- **Estimated assessment time** =
- the time at which the simulation iteration started +
- the historical average number of minutes it takes an assessment crew to arrive onsite +
- the historical average number of minutes it takes a crew to perform assessment once onsite
  
- **Estimated restoration time** =
- the estimated assessment time +
- the historical average number of minutes it takes a repair crew to arrive onsite +
- the historical average number of minutes it takes a crew to repair once onsite

### Exceptions:

If a crew that can perform assessment is already onsite:

**Estimated assessment time** =

The time at which the assessment crew arrived onsite +

the historical average number of minutes it takes a crew to perform assessment once onsite

If an event has an actual assessment provided and no repair crew is yet onsite:

**Estimated restoration time** =

The time at which the actual assessment was provided +

the historical average number of minutes it takes a repair crew to arrive onsite +

the actual number of minutes it will take to repair, per the assessment

If an event has an actual assessment provided and a repair crew is already onsite:

**Estimated restoration time** =

The time at which the repair crew arrived onsite +

the actual number of minutes it will take to repair, per the assessment =

If an event does not require assessment and no repair crew is yet onsite:

**Estimated restoration time** =

The time at which the simulation iteration started +

the historical average number of minutes it takes a repair crew to arrive onsite +

the historical average number of minutes it takes a crew to repair once onsite

**Note:** When the historical averages are applied to the calculation, the average that applies to the conditions at the time the particular step is projected to begin is used, not the average that applies to the conditions at the time the simulation iteration began. For example, Shift A has a particular average value for repair, and Shift B has a different average value for repair. The simulation iteration is in Shift A, but the calculated estimated assessment time falls in Shift B. When calculating the estimated restoration time, the historical average value for repair that pertains to Shift B will be used, not that of Shift A, because the repair isn't projected to begin until sometime during Shift B.

## Storm Mode Algorithm

The algorithm for estimate calculation in storm mode is similar to that of non-storm mode, except that in storm mode the data entered into the Crew Information table on the Storm Management window is taken into consideration and used as the known crew resource allocation. At the start of each simulation, the algorithm assembles a crew availability list from the Crew Information table and uses that to keep track of when the next available crews are projected to be ready as the calculation progresses.

For an event that resides in a control zone that is operating under storm mode, the calculation of its estimated assessment and estimated restoration times is as follows:

- Look up the historical average values that pertain to an event with its characteristics
- Verify whether or not an assessment has already been made for the event (if JOBS.ACT\_ASSESS\_TIME is non-null)

### **If assessment has been made:**

- The repair time assessment provided (JOBS.EST\_REPAIR\_MINUTES) will be used in the calculation rather than the historical Repair average
- Verify whether or not a crew is currently onsite for this event
- If a crew is onsite:
  - Check the crew type to verify whether or not this type of crew is one that can repair this event
  - If crew can repair:
    - It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The actual repair time assessment (JOBS.EST\_REPAIR\_MINUTES) is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event
  - If crew cannot repair:
    - It is assumed that the onsite crew is there to perform the assessment, and another crew must be sent out to perform the repair. The historical Travel to Repair average and the actual repair time assessment are added to the time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event
- If a crew is not onsite:
  - The historical Travel to Repair average and the actual repair time assessment are added to the time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event. The historical Clean average is added to the ERT and used as the time at which that eligible crew is available to be used for another event in the simulation.

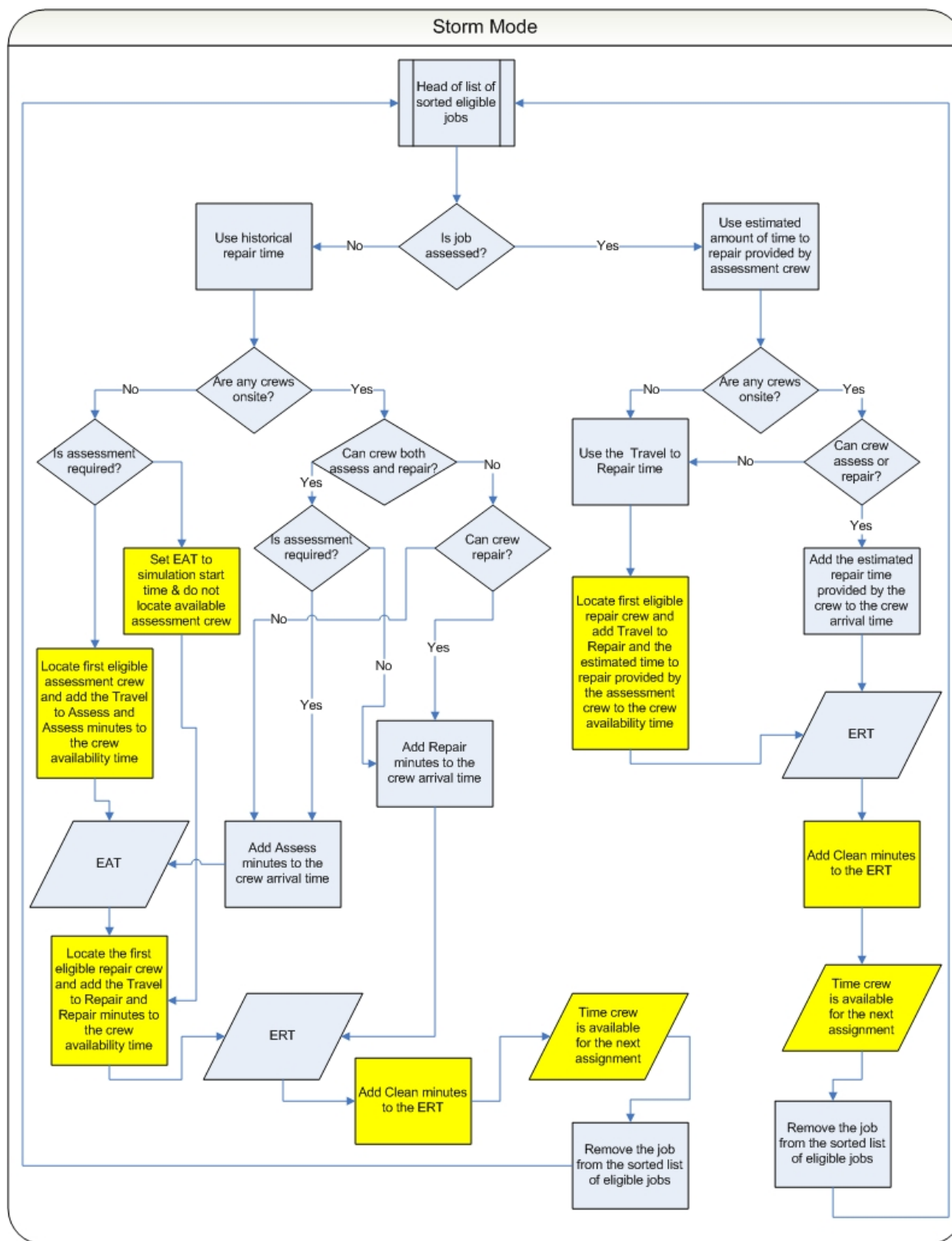
### **If no assessment has yet been made:**

- Verify whether or not a crew is currently onsite for this event
- If a crew is onsite:
  - Check the crew type to verify whether or not this type of crew is one that can both assess and repair this event
  - If the crew type cannot perform both tasks:
    - Verify if the crew type can repair this event
    - If crew can repair:

- It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The historical Repair average is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event
- If crew cannot repair:
  - It is assumed that the crew that's onsite is there to perform the assessment. The historical Assess average is added to the time at which the crew arrived onsite to generate the estimated assessment time (EAT). The historical Travel to Repair and historical Repair averages are added to the time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event. The historical Clean average is added to the ERT and used as the time at which that eligible crew is available to be used for another event in the simulation.
- If crew type can perform both tasks:
  - Verify whether or not assessment is required for this event (if Travel to Assess and Assess averages are both 0, assessment is not required)
  - If assessment is not required:
    - It is assumed that the crew that's onsite is there to perform the repair. The historical Travel to Repair average will not be used in the calculation. The historical Repair average is added to the time at which the crew arrived onsite to generate the estimated restoration time (ERT) for the event
  - If assessment is required:
    - It is assumed that the crew that's onsite is there to perform the assessment. The historical Assess average is added to the time at which the crew arrived onsite to generate the estimated assessment time (EAT). The historical Travel to Repair and historical Repair averages are added to time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event
- If a crew is not onsite:
  - Verify whether or not assessment is required for this event (if Travel to Assess and Assess averages are both 0, assessment is not required)
  - If assessment is not required:
    - No estimated assessment time (EAT) needs to be calculated. The historical Travel to Repair and historical Repair averages are added to the time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event. The historical Clean average is added to the ERT and used as the time at which that eligible crew is available to be used for another event in the simulation.
  - If assessment is required:
    - The historical Travel to Assess and historical Assess averages are added to the time at which the first crew that is eligible to assess this event will become available to generate the estimated assessment time (EAT) for the event. The EAT is used as the time at which that eligible assessment crew is available to be used for another event in the simulation. The historical Travel to Repair and historical Repair averages are added to the time at which the first crew that is eligible to repair this event will become available to generate the estimated restoration time (ERT) for the event. The historical Clean average is added to the ERT and used as the time at which that eligible repair crew is available to be used for another event in the simulation.

## Storm Mode Algorithm Flow Chart

The yellow boxes indicate where the storm mode algorithm differs from the non-storm mode algorithm.



In summary, for an event that's in a control zone operating under storm mode:

**Estimated assessment time =**

- The time at which the first crew that's eligible to assess the event will become available +
- the historical average number of minutes it takes an assessment crew to arrive onsite +
- the historical average number of minutes it takes a crew to perform assessment once onsite

**Estimated restoration time =**

- The time at which the first crew that's eligible to repair the event will become available after the estimated assessment time +
- the historical average number of minutes it takes a repair crew to arrive onsite +
- the historical average number of minutes it takes a crew to repair once onsite =

**Exceptions:**

If a crew that can perform assessment is already onsite,

**Estimated assessment time =**

- The time at which the assessment crew arrived onsite +
- the historical average number of minutes it takes a crew to perform assessment once onsite

If an event has an actual assessment provided and no repair crew is yet onsite:

**Estimated restoration time =**

- The time at which the first crew that's eligible to repair the event will become available after the actual assessment time +
- the historical average number of minutes it takes a repair crew to arrive onsite +
- the actual number of minutes it will take to repair, per the assessment

**Estimated restoration time =**

- If an event has an actual assessment provided and a repair crew is already onsite,
- The time at which the repair crew arrived onsite +
- the actual number of minutes it will take to repair, per the assessment

If an event does not require assessment and no repair crew is yet onsite:

**Estimated restoration time =**

- The time at which the first crew that's eligible to repair the event will become available after the time at which the simulation iteration started +
- the historical average number of minutes it takes a repair crew to arrive onsite +
- the historical average number of minutes it takes a crew to repair once onsite

**Note:** When the historical averages are applied to the calculation, the average that applies to the conditions at the time the particular step is projected to begin is used, not the average that applies to the conditions at the time the simulation iteration began. For example, Shift A has a particular average value for repair, and Shift B has a different average value for repair. The simulation iteration is in Shift A, but the calculated estimated assessment time falls in Shift B. When calculating the estimated restoration time, the historical average value for repair that pertains to Shift B will be used, not that of Shift A, because the repair isn't projected to begin until sometime during Shift B.

**Note:** If the algorithm finds that the calculated estimated assessment time or estimated restoration time would fall beyond the end of the shift of the first eligible crew by more than 60 minutes, it will go back and recalculate the estimate using a different crew other than the one that was originally chosen.

# Chapter 6

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## Service Alert Administration

This chapter describes the **Oracle Utilities Network Management System - Service Alert** application. It covers the following topics:

- **Overview**
- **Logging In**
- **Using the Service Alert Administration Tool**
- **Service Alert Notification Examples**

### Overview

**Oracle Utilities Network Management System - Service Alert** is an application that allows for sending notifications to utility personnel in the form of an e-mail, or to devices capable of receiving email messages such as an alphanumeric pager or cell phone. These notifications are triggered by “events” in Oracle Utilities Network Management System - Trouble Management. For example, a notification could be used to alert a marketing staff member that an unplanned outage affects a critical customer. This would enable the marketing person to contact the customer to provide up to date information about the status of the outage. Similarly, an operations staff member could be notified about the outage while away from the office.

Note that Service Alerts for planned events use the Web Switching Management’s Impacted Customers list from the corresponding switching sheet to determine which customers would be affected by a planned outage. The Impacted Customers list has to be generated for a switching sheet in order for Service Alert notifications to work. See **Using the Impacted Customers Tab** on page 9-46 for details on the Impacted Customer list.

As a notification engine, Service Alert provides for configurable delivery options through use of an administration tool, and dynamic message format control facilitated by XSL transformation of an XML-based message payload. This gives the administrator the ultimate power and flexibility in determining the routing and content of all notifications.

## Service Alert Admin Login Window

The Login window is the first Service Alert Administration window you see. You must enter a valid user name and password, and then click the Validate button. Once your user name and password are validated, the system populates the option menu that allows you to select a user type.

The Login window displays the following fields and buttons:

- The **User ID** field allows you to enter the user name provided to you by the system administrator.
- The **Password** field allows you to enter the password provided to you by the system administrator.
- The **Validate** button verifies your login credentials. If the user name and password are not entered correctly, the system displays a warning dialog box.
- The **User Type** drop-down menu contains the list of user types within your authority.
- The **Login** button allows you to complete the login process. Once you click the Login button, the Service Alert Administration window opens, based upon the User Type selected.
- The **Quit** button exits the Login window.

## Logging In

To login to Service Alert Administration, complete these steps:

1. Depending on how your system was installed, either:
  - Click the **Service Alert** icon found under the appropriate program group in your Windows Start Menu, or
  - Double click the **Service Alert** icon on your desktop, or
  - Open a web browser and type the Service Alert URL in the browser's Address field. The Service Alert Administration Tool Login window displays.
2. Enter your user name.
3. Enter your password.
4. Click the **Validate** button. The bottom portion of the Service Alert Administration Tool Login window sensitizes.
5. Select the appropriate **User Type** from the drop-down menu.
6. Click the **Login** button. The Service Alert Administration window opens.



# Using the Service Alert Administration Tool

The **Service Alert Administration Tool** enables you to configure message delivery options. It provides the following features:

- **General Features**
- **Contact Manager**
- **Group Manager**
- **Parameter Manager**
- **Utility Customer Manager**
- **Attribute Manager**

## General Features

### Preferences Menu

The following options in the Preferences menu are available at all times:

- **Save Preferences:** saves the current column selection settings as the user's preference. Column selection is available in the **Contact Manager**, **Parameter Manager**, and **Attribute Manager** tabs.
- **Restore Preferences:** restores the default column selections.

### Help Menu

The options in the Help menu are available at all times.

- **Service Alert Help (F1)** - opens the Online Help content for Service Alert.
- **About Storm Management** - opens a dialog that displays information regarding what version of the application is presently running, as well as version and other information about the Oracle Utilities Network Management System Web Gateway that the application is using.

### Logout Menu

The Logout menu provides the User Logout option, which logs the user out of **Service Alert** and closes the application.

## Contact Manager

The Contact Manager tab allows you to perform the following tasks:

- **Adding a Contact**
- **Editing a Contact**
- **Selecting a Paging Provider**
- **Removing a Contact**

For a description of the fields and buttons on this tab, see the following topic.

### Contact Manager Tab





The Contact Manager tab is used to add, edit, or remove contact information. The contact information contains identification information to associate each entry with an individual, as well as details regarding contacting the individual when a notification occurs. Note that an individual may have many contact entries. All contact entries in the system are listed in the Contacts table. Disabled contacts cannot receive notifications.




The Contact Manager tab displays the following fields and buttons:

- The **Contacts** panel lists company contacts that have been added through the Contact Manager. The table row colors correspond to whether a contact is active (white) or inactive (bluish gray). Rows in the table can be sorted in ascending or descending order by clicking on any column header.

The columns displayed are user selectable by right-clicking the table heading area and checking or unchecking the list of available columns in the **Select Columns to Display** dialog. Once the columns have been chosen, you may save the choices for your subsequent sessions by selecting **Save Preferences** from the **Preferences** menu; if not saved, the default columns will be displayed when you relogin. See **Preferences Menu** on page 6-3 for details on saving and restoring column selections.


The default product configuration displays the following columns:

- The **Contact ID** column contains the contact's identification number.
  - The **Name** column contains the contact's name.
  - The **Email** column contains the contact's email address.
  - The **Active** columns contains the **Y** or **N** Active status.
  - The **Email** column contains the contact's email address.
  - The **Pager/SMS** column contains the contact's pager address or SMS number.
  - The **Printer** column contains the contact's printer name.
- 
- The **Add** () button activates the editable fields in the Contact Information panel, which allows you to add a new contact.
  - The **Edit** () button allows the user to edit contact information for the contact selected in the Contacts table.
  - The **Remove** () button removes the currently selected contact parameter from the system.
  - The **Print** () button opens the Print Preview window that allows you to print the contact list.

- The **Contact Information** panel is where the details for a contact are entered and/or edited.
  - The **Name** field contains the contact's name. This field can be edited when in add/edit mode. For sorting purposes, it is recommended that names be entered in "Last name, First Name" type format.
  - The **Contact ID** field contains a unique identifier that is useful for identifying an individual, particularly when that individual has more than one contact entry. Sorting on the External ID allows for quick viewing of all an individual's contact entries. A work phone number (possibly concatenated with a phone extension) could be used, for example.
  - The **Current Groups** field contains the groups to which this contact belongs. This field is not editable by the user, although group memberships can be modified on the Group Manager panel.
  - The **Email** field contains the contact's email address. This field can be edited when in add/edit mode.
  - The **Printer** field contains the contact's printer name. This field can be edited when in add/edit mode.
  - The **Pager/SMS** field contains the contact's pager address or SMS number. This field can be edited when in add/edit mode. This value will be the email alias for the contact's page or SMS device. The button next to the field allows the user to browse for a paging provider to assist in constructing the pager address string.
  - The **Search** (  ) button opens the Select a Paging provider dialog. This dialog provides a convenient means for select a paging provider used in constructing the email alias for a pager.
  - The **Active** checkbox enables/disables the contact entry. Disabled contacts do not receive notifications.
- The **Save** (  ) button saves the contact information currently being added/edited to the database.
- The **Cancel** (  ) button cancels the current add/edit operation.

## Adding a Contact


To add a contact, complete these steps:

1. Click the **Contact Manager** tab on the Service Alert Administration Tool.
2. Click the **Add** (  ) button. The appropriate fields in the Contact Information section become enabled.
3. Fill in the following fields: Name, Contact ID, Email (optional), Pager/SMS (optional), Printer (optional), and Active. The **Save** button becomes enabled.
4. If necessary, select a paging provider. See the next section for instructions regarding selecting a paging provider.
5. Click the **Save** button to save the contact information.

**Note:** Creating a contact with a blank email, pager/SMS, and printer address effectively disables notification of the contact.

## Editing a Contact

To edit a contact, complete these steps:

1. Click the **Contact Manager** tab on the Service Alert Administration Tool.
2. Click on a row in the **Contacts** table. This row represents the contact to be edited.
3. Click the **Edit** () button. The appropriate fields become enabled.
4. Modify one or more of the following fields: Name, Contact ID, Email, Pager/SMS, Printer, and Active.
5. If necessary, select a paging provider. See **Selecting a Paging Provider** on page 6-6 for instructions regarding selecting a paging provider.
6. Click the **Save** button to save the contact information.

**Note:** Editing a contact to have a blank email, pager, and printer address effectively disables notification of the contact.

## Selecting a Paging Provider


To select a paging provider, complete these steps:

1. Click on the **Search** icon next to the Pager field. The Select a Paging Provider dialog appears.
2. Click on a row in **Paging Providers** table. This row represents the paging provider to be chosen. The Paging Providers table contains the following columns:
  - **Provider** – The name of the paging provider company.
  - **Prefix** – A description of how an email alias for the pager is constructed. Typically, a sample prefix will be concatenated with the domain name.
  - **Domain Name** – The domain name used to construct the email alias for the pager device.
3. Click **OK** to choose the selected paging provider, or **Cancel** to dismiss the dialog without selecting a provider. The Select Paging Provider dialog closes.
4. Edit the **Pager** text field as appropriate.

**Note:** The paging provider table is populated during the system installation. If you need to add, edit or modify paging provider information then please contact your system administrator.

## Removing a Contact

To remove a contact, complete these steps:

1. Click the **Contact Manager** tab on the Service Alert Administration Tool.
2. Click on a row in the **Contacts** table. This row represents the contact to be removed.
3. Click the **Remove** () button. The Remove Contact dialog opens.
4. Click **Yes** to remove the contact from the system, or **No** to avoid removing the contact from the system.

## Group Manager

The Group Manager tab on the Service Alert Administration Tool window is used to add, edit or remove contact groups, as well as specify the notification format for a group based on each notification type. A group is used in defining notification parameters. A notification parameter is the definition of a rule used to trigger a notification. Every parameter requires a group of contacts to be specified. This group specifies the intended recipients of a notification.

From the Group Manager tab, you can perform the following tasks:

- **Adding a Group**
- **Removing a Group**
- **Adding a Contact to a Group**
- **Removing a Contact from a Group**
- **Modifying the Message Transformation File**

For a description of the fields and buttons on this tab, see the following topic.

### Group Manager Tab

The Group Manager tab contains the following information:

- The **Groups** panel displays a list of all groups in the system. A group does not need to contain any contacts, nor does it need to be associated with a notification parameter.
  - The **Add** (+) button on the Groups panel opens the **Add Group** dialog. This dialog allows a new, empty group to be created. Each group must have a unique name.
  - The **Remove** (X) button on the Groups panel deletes the group from the database. This will also delete all parameters associated with the group, but contacts that are members of the group are not deleted.
- The **Contacts** panel displays a list of the individual members in the selected group.
  - The **Add** (+) button on the Contacts panel opens the **Add Contact** dialog. This dialog allows contacts to be added to the selected group.
  - The **Remove** (X) button on the Contacts panel removes the selected contact from the selected group.
- The **Message Types** panel displays a list of the available notification message types that the selected group can receive.
- The **Transforms** panel contains information regarding the transforms for the selected message type.
  - The **Email** field displays the transform, in the form of an XSL file, which will be applied to the notifications of the selected notification type bound for an email destination corresponding to members of the selected group.
  - The **Pager/SMS** field displays the transform, in the form of an XSL file, which will be applied to the notifications of the selected notification type bound for a pager/SMS destination corresponding to members of the selected group.
  - The **Printer** field displays the transform, in the form of an XSL file, which will be applied to the notifications of the selected notification type bound for a printer destination corresponding to members of the selected group.
- The **Modify Transform** button saves the XSL file information to the database for the selected group and notification type. The user must verify that the specified XSL file is available in the designated location.

## Adding a Group

To add a group, complete these steps:

1. Click the **Group Manager** tab on the Service Alert Administration Tool.
2. Click the **Add** (+) button. The Add Group dialog opens.
3. Enter a group name in the Group Name text field.
4. Click **OK** to create a group, or **Cancel** to avoid creating the group.

## Removing a Group

To remove a group, complete these steps:

1. Click the **Group Manager** tab on the Service Alert Administration Tool.
2. Click on a group on the **Groups** list. The highlighted group is the group to be removed.
3. Click the **Remove** (X) button. A confirmation dialog opens.
4. Click **Yes** to remove the group, or **No** to avoid removing the group.

## Adding a Contact to a Group

To add a contact to a group, complete these steps:

1. Click the **Group Manager** tab on the Service Alert Administration Tool.
2. Click on a group on the **Groups** list. The highlighted group is the group to which a contact will be added.
3. Click on the **Add** (+) button. The Select Contact dialog opens. The Contacts table in the Select Contact dialog displays all the contacts in the system that do not belong to the selected group.
4. Click on a row in the Contacts table. The Contacts table contains the following columns:
  - **ID** – System assigned unique id for the contact.
  - **External ID** – A unique identifier that is useful for identifying an individual, particularly when that individual has more than one contact entry. Sorting on the External ID allows for quick viewing of all an individual's contact entries, *e.g.*, Employee ID.
  - **Name** – The contact's name.
  - **Email** – The contact's email address.
  - **Pager/SMS** – The contact's pager or SMS address.
  - **Active** – A flag to indicate whether or not the contact is enabled in the system. Disabled contacts cannot receive notifications. Note that the table row colors correspond to whether a contact is active (white) or inactive (light blue).
  - **Printer** – The contact's printer name.
5. Click **OK** to add the selected contact to the group, or **Cancel** to avoid adding the contact to the group.

## Removing a Contact from a Group

To remove a contact from a group, complete these steps:

1. Click the **Group Manager** tab on the Service Alert Administration Tool.
2. Click on a group on the **Groups** list. The highlighted group is the group from which a contact will be removed. The Contacts list displays the contacts in the selected group.
3. Click on a contact on the **Contacts** list. This is the contact to be removed.

4. Click the **Remove** (✖) button. The Remove Contact From Group dialog opens.
5. Click **Yes** to remove the contact from the group, or **No** to avoid removing the contact from the group.

## Modifying the Message Transformation File

To modify the transform for a given group and notification type, complete these steps:

1. Click the **Group Manager** tab on the Service Alert Administration Tool.
2. Click on a group on the **Groups** list. The highlighted group is the group for which the transformation filename will be modified.
3. Click on a notification type in the **Message Type** list. The highlighted type will be the notification type for which the transformation filename will be modified. The Email, Pager, and Printer transformation filename fields display default values for each transformation.
4. Modify the filenames associated with each transform.
5. Click **Modify Transform** to save the filenames to the database.

## Parameter Manager

The Parameter Manager tab is used to add, edit, or remove notification triggering parameter information. A notification triggering parameter is the rule for defining a notification trigger within Service Alert. A parameter consists of a name, a threshold value, a group to notify when a violation occurs, and an associated control zone, device, or customer. Inactive parameters cannot be violated, and therefore will never trigger a notification.

The Parameter Manager tab allows you to perform the following tasks:

- **Adding a Customer Count Parameter**
- **Adding a Specific Customer Parameter**
- **Adding a Frequency of Outages Parameter**
- **Adding a Storm Affecting Control Zone Parameter**
- **Editing a Parameter**
- **Removing a Parameter**

For a description of the fields and buttons on this tab, see the following topic.

### Parameter Manager Tab

The Parameter Manager tab contains two panels:

- **Parameters Panel**
- **Parameter Information Panel**

#### Parameters Panel

The Parameters Panel displays the following fields and buttons:

- The **Parameters** panel lists all parameters in the system. Note that the table row colors correspond to whether a parameter is active (white) or inactive (bluish gray). For convenience, the rows in the table can be sorted in ascending or descending order by clicking on any column header.




The columns displayed are user selectable by right-clicking the table heading area and checking or unchecking the list of available columns in the **Select Columns to Display** dialog. Once the columns have been chosen, you may save the choices for your subsequent

sessions by selecting **Save Preferences** from the **Preferences** menu; if not saved, the default columns will be displayed when you relogin. See **Preferences Menu** on page 6-3 for details on saving and restoring column selections.

The default product configuration displays the following columns:

- The **Name** column contains a descriptive name given to the parameter.
- The **Type** column contains the notification type on which the parameter is based.
- The **Value** column contains the threshold value used in determining if a parameter violation has occurred. The units for this value are based on the notification type. For example, the parameter value unit of for the “Outage” notification type is “number of customers out.” The “Outage affecting critical customer(s)” notification parameter value unit is “number of critical customers out.”
- The **Contact Group** column contains the group of contacts to be notified when a parameter violation occurs.
- The **Control Zone** column contains the control zone to which the parameter applies.
- The **Device Class** column contains the type of device to which the parameter applies, if applicable.
- The **Device** column contains the device to which the parameter applies.

**Note:** A parameter must specify either a control zone or a device (but not both).

- The **Account** column contains the account number of the customer associated with the parameter, if applicable.
- The **Time Interval** column contains the time interval associated with the parameter, if applicable.
- The **Event Type** column contains the name(s) of the specific event type(s) this notification will be triggered for.
- The **Event State** column contains the name(s) of the specific event state(s) this notification will be triggered for. (Currently only used for Specific customer affected by unplanned outage notification.)
- The **Use Event States** column contains a flag to indicate whether the Event State trigger is active for the parameter.
- The **Customer Types** column contains the critical customer types used in calculations for the associated notification.
- The **Planned** column displays Y if notification should only be triggered for planned events.
- The **Disable During Storm** column contains a flag to indicate whether parameter violation should be suppressed when the associated control zone is in storm mode or the associated device resides in a control zone that is in storm mode. Storm modes are defined as part of Oracle Utilities Network Management System – Trouble Management configuration (rule sets applied to a control zone in the Authority tool).
- The **Add** (  ) button activates the editable fields in the Parameter Information panel, which allows you to add a new parameter.
- The **Edit** (  ) button allows you to edit the currently selected parameter.
- The **Remove** (  ) button removes the currently selected parameter from the system.



## Parameter Information Panel

The Parameter Information Panel is where the details for a parameter are entered and/or edited. The Parameter Information Panel displays the following fields and buttons:

**Note:** The fields and buttons on this panel vary depending on the type of notification.

- The **Name** field displays the descriptive name given to the parameter. This value can be modified when in add/edit mode.
- The **Select Contact Groups** button brings up the Select Contact Groups dialog for selecting one or more groups to be notified when the parameter is violated. You can use the Control key in conjunction with the left mouse button to make multiple selections or deselect a group in the Select Contact Groups dialog. This button is enabled when in add/edit mode.
- The **Type** field displays a list of enumerated notification types to which this parameter applies. This value can be selected when in add/edit mode.
  - Outage
  - Outage Affecting Critical Customer(s)
  - Outage Affecting Specific Customer
  - Frequency of Outages on a Device
  - Storm Affecting Control Zone
- The **Value** field displays the parameter threshold value. This value can be modified when in add/edit mode.
- The **Event Type** radio group allows you to select whether notification should be triggered by Planned or Unplanned events. This is only displayed for outage-type notifications.
  - The **Select Event Types** button brings up the Select Event Types dialog for selecting one or more event types that will trigger the notification when the parameter is violated. You can use the Control key in conjunction with the left mouse button to make multiple selections or deselect a group in the Select Event Types dialog. This button is enabled when in add/edit mode only when Unplanned Event Type is selected.
- The **Trigger** group allows you to select the event status that will trigger the notification. This group may contain one or more of the following options:
  - **Scheduled** - This checkbox is enabled only for outage notifications where the Event Type is Planned. If this is checked, the system will generate a notification when a switching sheet reaches the scheduled state, provided that other notification conditions are met.
  - **Started/In-Progress** - This checkbox is enabled only for outage notifications where the Event Type is Planned. If this is checked, the system will generate a notification when a planned or unplanned outage is started, provided that other notification conditions are met.
  - **Restored** - This checkbox is enabled only for outage notifications where the Event Type is Planned. If this is checked, the system will generate a notification when a planned or unplanned outage is restored, provided that other notification conditions are met.
  - **Cancelled** - This checkbox is enabled only for outage notifications where the Event Type is Planned. If this is checked, the system will generate a notification when a switching sheet reaches cancelled state, provided that other notification conditions are met.
  - **ERT Updated** - This checkbox is enabled only for outage notifications where the Event Type is Unplanned. If this is checked, the system will generate a notification when an ERT is manually updated for an unplanned outage, provided that other notification conditions are met.

- **Storm Started / Storm Ended** - These checkboxes are enabled only if the notification type is Storm Affecting Control Zone. Check the box indicating when the notification should be generated, either when the storm starts or ends.
- The **Device** field displays the alias of the device to which the parameter applies. A parameter may specify either a control zone or a device (but not both). This value can be modified when in add/edit mode, depending upon the type of notification selected.
  - The **Device Search** button displays the Device Search dialog, allowing you to search for a device to associate with the parameter, if applicable.
  - The **Clear** button clears the Device field when pressed.
- The **Device Class** field displays the class or type of device to which the parameter applies. This value can be modified when in add/edit mode, depending upon the type of notification selected.
  - The **Select Device Class** button displays the Select Class dialog, allowing you to select a type of device to associate with the parameter, if applicable.
  - The **Clear** button to the right of the Select Device Class button clears the Device Class field when pressed.
- The **Control Zone** field displays the control zone of the device to which the parameter applies. A parameter must specify either a control zone or a device (but not both). This value can be modified when in add/edit mode.
  - The **Select Zone** button displays the Select Control Zone dialog, allowing you to associate the parameter with a control zone, if applicable.
  - The **Clear** button to the right of the Control Zone field clears the Control Zone field when pressed.
- Click the **Use Event States** checkbox if you want to select specific event states that will trigger the notification when the parameter is violated. If checked, the **Select Event States** button is enabled.
  - The **Select Event States** button brings up the Select Event States dialog for selecting one or more event states. You can use the Control key in conjunction with the left mouse button to make multiple selections or deselect a group in the Select Event Types dialog. This button is enabled when in add/edit mode.
- The **Time Interval** field displays the time interval value associated with the parameter. This value can be modified when in add/edit mode, depending upon the type of notification selected.
  - The **Specify Time Interval** button displays the Specify Time Interval dialog, allowing you to specify what time interval should be used for the parameter, if applicable.
  - The **Clear** button to the right of the Specify Time Interval button clears the Time Interval field when pressed.
- The **Customer Account** field displays the account number of the customer associated with the parameter, if applicable.
- The **Account Search** button displays the Select Account dialog, allowing you to search for a particular customer account to associate with the parameter, if applicable.
- The **Clear** button to the right of the Customer Account field clears the Customer Account field when pressed.
- The **Disable During Storm** checkbox allows you to enable/disable the parameter during storm mode.
- The **Active** checkbox allows you to enable/disable the parameter.

- The **Select Customer Types** button allows you to select one or more customer types to be considered in the calculations for the notification. This button is displayed only for notifications that involve critical customers.

When you click this button, the Select Customer Type dialog opens. Select the customer types to include, then click **OK**.

**Note:** If a customer belongs to more than one of the selected customer types, the customer is only counted once in the calculation.

- The **Save** button saves the parameter information.
- The **Cancel** button cancels an add/edit parameter operation.

## About Parameter Values

A parameter must have certain required data specified before it may be saved. A parameter consists of a name, a threshold value, a group to notify when a violation occurs, and an associated control zone, device, or customer. The parameter value has a different meaning in the context of each of the various notification types.

The following table gives the units for each notification type.

Notification Type	Parameter Value Unit
Outage	Number of customers affected
Outage affecting critical customers	Number of critical customers affected
Outage affecting specific customer	N/A
Frequency of outages on a device	Number of outages
Storm affecting control zone	N/A

**Note:** A group must exist to save the parameter. Use the Group Manager tab to create a group if one does not already exist.

Different notification types have different additional data required. The following table lists the other required values for each notification type.

Notification Type	Other Required Information
Outage	Event Type, Trigger, Device or Control Zone or Device Class and Control Zone
Outage affecting critical customers	Event Type, Trigger, Device or Control Zone or Device Class and Control Zone
Outage affecting specific customer	Event Type, Trigger, Customer Account
Frequency of outages on a device	Time Interval, Device or Device Class or Control Zone
Storm affecting control zone	Trigger, Control Zone

## Adding a Customer Count Parameter

To add either an Outage notification parameter or an Outage affecting critical customer(s) notification parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click the **Add** button. The appropriate fields on the Parameter Information panel become enabled.
3. Enter a descriptive name for the parameter into the **Name** field.
4. Click the **Select Contact Groups** button. The Select Contact Groups dialog appears.
5. Select one or more groups to be notified when the parameter is violated from the Select Contact Groups dialog.
6. Click the **OK** button on the Select Contact Groups dialog. The Select Contact Groups dialog disappears.
7. Select either “1. Outage” or “2. Outage affecting critical customer(s)” from the **Type** drop-down menu.
8. Enter a number in the **Value** field that represents the number of customers (for an Outage notification) or the number of critical customers (for an Outage affecting critical customer(s) notification) that must be out in order to trigger the notification.
9. Select either Unplanned or Planned from the **Event Type** radio group.
10. To limit the types of events that can trigger the notification, click the **Select Event Types** button, then make your selection(s) on the Select Event Types dialog. If no selection is made, then the notification is triggered by all event types.
11. Select one or more check boxes in the **Trigger** section to specify when this notification should be triggered.
12. Either specify a device or a control zone for the parameter. This is used in conjunction with the Value in order to trigger the notification.
13. To specify a device, either type a device name into the **Device** field, or do the following:
  - Click the **Device Search** button. The Device Search dialog opens.
  - Enter your search criteria into the Search Text field. You may use an asterisk (“\*”) as a wildcard.
  - Click the **Search** button. The search results are displayed in the table.
  - Select the desired device from the table, and then click the **OK** button. The Device Search dialog disappears, and the Device field is populated with the name of the selected device.
14. To specify a control zone, do the following:
  - Click the **Select Zone** button. The Select Control Zone dialog opens.
  - Select the desired control zone from the tree, and then click the **OK** button. The Select Control Zone Dialog disappears, and the Control Zone field is populated with the name of the selected control zone.
15. Select/deselect the **Use Event States**, **Disable During Storm**, and **Active** checkboxes as desired.
16. Click the **Save** button to save the parameter.

## Adding a Specific Customer Parameter

To add an Outage affecting a specific customer parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click the **Add (+)** button. The appropriate fields on the Parameter Information panel become enabled.
3. Enter a descriptive name for the parameter into the **Name** field.
4. Click the **Select Contract Groups** button. The Select Contact Groups dialog appears.
5. Select one or more groups to be notified when the parameter is violated from the **Select Contact Groups** dialog.
6. Click the **OK** button on the Select Contact Groups dialog. The Select Contact Groups dialog disappears.
7. Select “3. Outage affecting specific customer notification” from the **Type** drop-down menu.
8. Select either Unplanned or Planned from the **Event Type** radio group.
9. To limit the types of events that can trigger the notification, click the **Select Event Types** button, then make your selection(s) on the Select Event Types dialog. If no selection is made, then the notification is triggered by all event types.
10. Select one or more check boxes in the **Trigger** section to specify when this notification should be triggered.
11. Click the **Account Search** button to bring up the Account Search dialog.
12. Select a search criterion on the **Search Parameter** drop-down menu.
13. Enter text into the **Search Text** field according to the search criterion selected in the previous step. Note that an asterisk (\*) serves as a wildcard.
14. Click the **Search** button. The search results are displayed in the table.
15. Select the desired account from the table, and then click the **OK** button. The Account Search dialog disappears, and the Customer Account field is populated with the account number of the selected customer account.
16. Select/deselect the **Use Event States**, **Disable During Storm**, and **Active** checkboxes as desired.
17. Click the **Save** button to save the parameter.

## Adding a Frequency of Outages Parameter

To add a Frequency of Outages on a Device Notification parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click the **Add (+)** button. The appropriate fields on the Parameter Information panel become enabled.
3. Enter a descriptive name for the parameter into the **Name** field.
4. Click the **Select Contract Groups** button. The Select Contact Groups dialog appears.
5. Select one or more groups to be notified when the parameter is violated from the **Select Contact Groups** dialog.
6. Click the **OK** button on the Select Contact Groups dialog. The Select Contact Groups dialog disappears.
7. Select “5. Frequency of outages on a device notification” from the Type drop-down menu.

8. Enter a number in the **Value** field that represents the number of outages there must be in order to trigger the notification.
9. If desired, click the **Select Event Types** button to bring up the Select Event Types dialog to limit the types of events that can trigger the notification. If no selection is made, then the default is all event types.
10. Click the **Specify Time Interval** button to bring up the Specify Time Interval dialog. Specify a time interval either as a certain number of hours/days/weeks/years.

To specify the time interval as having a specific begin date, complete these steps:

- Select the **Begin Date** radio button on the Specify Time Interval dialog. The Calendar button becomes enabled.
- Click on the **Calendar** button. The Calendar dialog appears.
- Specify the desired begin date and time in the Calendar dialog, then press the **OK** button. The Calendar dialog disappears, and the selected date/time now appears in the field next to the Begin Date radio button.

To specify the time interval as a certain number of hours/days/weeks/years, complete these steps:

- Select the **Time Window** radio button. The text field and drop-down button to the right of it become enabled.
- Select the desired unit of time from the drop-down menu and enter the desired number of units into the text field.
- Click the **OK** button on the Specify Time Interval dialog. The Specify Time Interval dialog disappears, and the Time Interval field is populated with the interval that was specified.

11. Either specify a device or a device class and control zone for the parameter. These are used in conjunction with the Value and Time Interval in order to trigger the notification.

To specify a device, either type a device name into the **Device** field, or do the following:

- Click the **Device Search** button to bring up the Device Search dialog.
- Enter your search criteria into the **Search Text** field. You may use an asterisk (\*) as a wildcard.
- Click the **Search** button. The search results are displayed in the table.
- Select the desired device from the table, and then click the **OK** button. The Device Search dialog disappears, and the Device field is populated with the name of the selected device.

To specify a device class and control zone combination, complete these steps:

- Click the **Select Device Class** button. The Select Class dialog appears.
- Select the desired device class from the tree, and then click the **OK** button. The Select Class dialog disappears, and the Device Class field is populated with the name of the device class.
- To specify a control zone, click the **Select Zone** button. The Select Control Zone dialog appears.
- Select the desired control zone from the tree, and then click the **OK** button. The Select Control Zone Dialog disappears, and the Control Zone field is populated with the name of the selected control zone.

12. Select/deselect the **Use Event States**, **Disable During Storm**, and **Active** checkboxes as desired.

13. Click the **Save** button to save the parameter.

## Adding a Storm Affecting Control Zone Parameter

To add a Storm Affecting Control Zone parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click the **Add** (+) button. The appropriate fields on the Parameter Information panel become enabled.
3. Enter a descriptive name for the parameter into the **Name** field.
4. Click the **Select Contract Groups** button. The Select Contact Groups dialog appears.
5. Select one or more groups to be notified when the parameter is violated from the **Select Contract Groups** dialog.
6. Click the **OK** button on the Select Contact Groups dialog. The Select Contact Groups dialog disappears.
7. Select “6. Storm affecting control zone” from the Type drop-down menu.
8. Check **Storm Started** and/or **Storm Ended** in the **Trigger**.
9. Click the **Select Zone** button. The **Select Control Zone** dialog appears.
10. Choose the desired control zone for the alert and click **OK**. The **Control Zone** field will be populated with your choice.
11. Click the **Save** button to save the parameter.

## Editing a Parameter

To edit a parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click on one of the existing parameters in the Parameters table. The **Edit** button becomes enabled.
3. Click the **Edit** (✎) button. The appropriate fields will become enabled.
4. Edit each field as desired.
5. Click **Save** to save the edited information, or click **Cancel** to avoid saving the edited information.

## Removing a Parameter

To remove a parameter, complete these steps:

1. Click the **Parameter Manager** tab on the Service Alert Administration Tool.
2. Click on one of the existing parameters in the Parameters table. The **Remove** button becomes enabled.
3. Click the **Remove** (✖) button. The Remove Parameter dialog opens.
4. Click **Yes** to remove the parameter or **No** to avoid removing the parameter.

## Utility Customer Manager

The Utility Customers tab is used for designating customers as being “critical” within Service Alert and entering contact information for each critical customer. This information will display in the “Outage affecting critical customer(s)” notification. To “import” a customer into Service Alert, an “add” operation must be performed. Once the customer has been added, customer contacts can be associated with the account. Each customer contact can also have one or more phone entries, which indicate how the customer contact can be reached. To bring up contact information for an existing Service Alert Critical account, a “search” must be performed.




The Utility Customers tab allows you to perform the following tasks:

- **Adding an Account to Service Alert**
- **Searching for an Account**
- **Editing an Account**
- **Removing an Account**
- **Editing Customer Device Information**
- **Adding Customer Contact Information**
- **Searching for a Customer Contact**
- **Editing Customer Contact Information**
- **Removing Customer Contact Information**
- **Adding Customer Contact Phone Information**
- **Editing Customer Contact Phone Information**
- **Removing Customer Contact Phone Information**





For a description of the fields and buttons on this tab, see the following topic.

### Utility Customers Tab

The Utility Customers tab displays the following fields and buttons:

- The header section contains details regarding a specific customer account.
  - The **Account Number** field displays the account number of the critical customer.
  - The **Name** field displays the name of the critical customer.
  - The **Address** field displays the address of the critical customer.
  - The **Client Type** menu allows you to specify a client type value for the critical customer. The available options are Undetermined, Office, Computer Data Center, Communications, Shelter, Command Center, Company Executives, and Business Leaders.
- The **Add** () button displays the Add Account dialog. This dialog allows you to add a critical customer into Service Alert. The main reason for doing this is to associate contact and contact phone information with the critical customer.
- The **Edit** () button places the header section into edit mode, allowing you to modify both the customer account name and the client type value.
- The **Remove** () button removes an account from Service Alert. This does not affect the customer’s entries in the Oracle Utilities Network Management System tables.
- The **Search** button displays the Search Account dialog. This dialog allows you to search for a critical customer that was previously added to Service Alert.



- The **Save** button allows you to save any changes you made while the header section was in edit mode, and returns the section to non-editable mode.
- The **Cancel** button returns the section to non-editable mode without saving any changes.
- The **Customer Devices** panel displays a list of devices that are associated with the currently selected account. For convenience, the rows in the table can be sorted in ascending or descending order by clicking on any column header.
  - The **Service Location ID** column contains the service location identification value for the device.
  - The **Device ID** column contains the identification value for the device.
  - The **Load Transfer** column contains the load transfer value for the device. The available options are NONE, AUTOMATIC, and MANUAL.
  - The **Load Shed** column contains the load shed value for the device. The available options are NO and YES.
  - The **Edit** () button brings up the Device Information dialog, allowing you to modify the Load Transfer and Load Shed values of the selected device.
- The **Customer Contacts** panel contains the list of contacts for the currently selected account. For convenience, the rows in the table can be sorted in ascending or descending order by clicking on any column header.
  - The **ID** column contains the system assigned unique id for the customer contact entry.
  - The **Name** column contains the customer contact name.
  - The **Title** column contains the customer contact title, if applicable.
  - The **Instructions** column contains general instructions for contacting this individual.
  - The **Add** () button displays the Add/Edit Customer Contact dialog. This dialog allows you to add a customer contact.
  - The **Edit** () button displays the Add/Edit Customer Contact dialog. This dialog allows you to edit a customer contact.
  - The **Remove** () button removes the contact from the critical customer contact listing.
  - The **Search...** button displays the Search Customer Contacts dialog. This dialog allows you to search for a customer contact that was previously added to Service Alert.
- The **Customer Contact Phones** panel displays phone information for the currently selected contact in the Customer Contacts table. For convenience, the rows in the table can be sorted in ascending or descending order by clicking on any column header.
  - The **ID** column contains the system assigned unique id for the customer contact phone entry.
  - The **Type** column contains the type of phone (Office, Home, Cell, etc.).
  - The **Number** column contains the phone number.
  - The **Ext** column contains the phone extension, if applicable.
  - The **Call Time** column contains the time of day to call the individual using this phone number (Anytime, Daytime, Nighttime, etc.).
  - The **Sequence** column contains the preferred calling order for reaching the customer contact.

- The **Add** (+) button displays the Add/Edit Customer Contact Phone dialog. This dialog allows you to add a customer contact phone entry.
- The **Edit** (✎) button displays the Add/Edit Customer Contact Phone dialog. This dialog allows you to edit a customer contact phone entry.
- The **Remove** (✖) button removes the contact phone entry from the selected contact's list of phone contact information.

## Adding Accounts

The **Add Account** dialog opens once you press the **Add** (+) button on the Utility Customers tab. This dialog allows you to add a critical customer into Service Alert.

The Add Account dialog displays the following fields and buttons:

- The **Search Text** field displays the text used to search for a critical customer account. The text varies based on the search parameter. The asterisk character (\*) serves as a wildcard.
- The **Search Parameter** field displays the current search parameter. The available parameters are Account Number, Account Name, Phone Number, Address, City State, and Zip Code.
- The **Search** button performs a critical customer search within the Oracle Utilities Network Management System database based upon the Search Text and Search Parameter.
- The **Clear** button clears the Search Text field and the search results table.
- The **Account Number** column displays the account number of the critical customer.
- The **Account Name** column displays the account name of the critical customer.
- The **Phone Number** column displays the phone number of the critical customer.
- The **Address** column displays the address of the critical customer.
- The **City State** column displays the city and state portion of the critical customer's address.
- The **Zip Code** column displays the zip code of the critical customer.
- The **Emergency** column is a flag to indicate that this is an Emergency customer.
- The **Key** column is a flag to indicate that this is a Key customer.
- The **Medical** column is a flag to indicate that this is a Medical customer.
- The **OK** button adds the customer to Service Alert and closes the Add Account dialog.
- The **Cancel** button closes the Add Account dialog without adding the customer to Service Alert.

## Adding an Account to Service Alert

To add an account to Service Alert, complete these steps:

1. Click the **Utility Customers** tab on the Service Alert Administration Tool.
2. Click the **Add** (+) button. The **Add Account** dialog opens.
3. Select a search criterion on the **Search Parameter** drop menu.
4. Enter text into the **Search Text** field according to the search criterion selected in the previous step. Note that an asterisk (\*) serves as a wildcard.
5. Click the **Search** button to perform a search for critical customers in the Oracle Utilities Network Management System database. The search result table populates with a set of customer data.

6. Select a customer by clicking on a row in the table. The **OK** button becomes enabled.
7. Click **OK** to add the customer to Service Alert, or **Cancel** to avoid adding the account.

## Searching for an Account

The Search Account dialog opens once you press the **Search** button on the header section of the Utility Customers tab in the Service Alert Administration Tool. This dialog allows you to search for a critical customer that was previously added to Service Alert.

The Search Account dialog contains the following information:

- The **Search Text** field displays the text used to search for a critical customer account within the Service Alert tables. The text varies based on the search parameter. The asterisk character (“\*”) serves as a wildcard.
- The **Search Parameter** field displays the current search parameter. The available parameters are Account Number, Account Name, Phone Number, Address, City State, and Zip Code.
- The **Search** button performs a critical customer search within the Service Alert database based on the search text and search parameter. The search is executed against customers previously added to Service Alert by means of **Adding Accounts** functionality.
- The **Clear** button clears the Search Text field and the search results table.
- The **Account Number** column displays the account number of the critical customer.
- The **Account Name** column displays the account name of the critical customer.
- The **Phone Number** column displays the phone number of the critical customer.
- The **Address** column displays the address of the critical customer.
- The **City State** column displays the city and state portion of the critical customer’s address.
- The **Zip Code** column displays the zip code of the critical customer.
- The **Emergency** column is a flag to indicate that this is an Emergency customer.
- The **Key** column is a flag to indicate that this is a Key customer.
- The **Medical** column is a flag to indicate that this is a Medical customer.
- The **OK** button populates the Utility Customer panel with customer information, including contacts and contact phone entries, and closes the Search Account dialog.
- The **Cancel** button closes the Search Account dialog.


## Searching for an Account in Service Alert

To search for an account, complete these steps:

1. Click the **Utility Customers** tab on the Service Alert Administration Tool.
2. Click the **Search** button. The Search Account dialog opens.
3. Select a search criterion on the **Search Parameter** drop menu.
4. Enter text into the **Search Text** field according to the search criterion selected in the previous step. Note that an asterisk (“\*”) serves as a wildcard.
5. Click the **Search** button to perform a search for critical customers within Service Alert. The search result table populates with a set of customer data.
6. Select a customer by clicking on a row in the table. The **OK** button becomes enabled.
7. Click **OK** to display the customer data and contact information on the Utility Customer panel, or **Cancel** to avoid selecting the account.


## Editing an Account

To edit an account, complete these steps:

1. Search for an Account. (Refer to the previous topic for instructions). The customer account information loads into the header section.
2. Click the **Edit** () button. The Name and Client Type fields become editable.
3. Edit the **Name** field and change the selected **Client Type** as desired.
4. Click the **Save** button. The changes are saved and the header section returns to non-edit mode. In order to exit from edit mode without saving changes, click the **Cancel** button instead.


## Removing an Account

To remove an account, complete these steps:

1. Search for an Account. (Refer to the previous topic for instructions). The **Remove** button becomes enabled.
2. Click the **Remove** () button. The Remove Customer Account dialog opens.
3. Click **Yes** to remove the account from the system, or **No** to avoid removing the account from the system.


## Editing Customer Device Information

To edit the load transfer or load shed information for a customer device, complete these steps:

1. Add an account or search for an account, as described in the previous topics.
2. Select a row in the Customer Devices table on the Utilities Customer tab.
3. Click the **Edit** () button. The Device Information dialog opens.
4. Change the **Load Transfer** or **Load Shed** values as desired.
5. Click the **OK** button to close the dialog and save the changes, or click the **Cancel** button to exit from dialog without saving the changes.

## Adding Customer Contact Information

To add customer contact information, complete these steps:

1. Add an account or search for an account, as described in the previous topics.
2. In the Customer Contacts section, click the **Add** () button. The Add/Edit Contact dialog opens.
3. Enter in a **Name** and **Title** for the customer contact. If applicable, enter in general instructions, or any other relevant information, regarding the contacting of the individual. The **OK** button becomes enabled.
4. Click **OK** to add the customer contact information to the database or **Cancel** to avoid adding the information.

## Searching for a Customer Contact

The Search Customer Contacts dialog opens once you press the Search button on the Customer Contacts section of the Utility Customers tab. This dialog allows you to search for a customer contact that was previously added to Service Alert.

The Search Customer Contacts dialog displays the following fields and buttons:

- The **Search Text** field displays the text used to search for a critical customer account within the Service Alert tables. The text varies based on the search parameter. The asterisk character (\*) serves as a wildcard.
- The **Search Parameter** field displays the current search parameter. The available parameters are Contact Name, Contact ID, Contact Title, Account Name, and Account Number.
- The **Search** button performs a customer contact search within the Service Alert database based on the search text and search parameter. The search is executed against customer contacts previously added to Service Alert by means of the **Adding Customer Contact Information** on page 6-22 functionality.
- The **Clear** button clears the Search Text field and the search results table.
- The **Contact ID** field contains the system assigned unique id for the customer contact entry.
- The **Contact Name** column contains the customer contact name.
- The **Contact Title** column contains the customer contact title, if applicable.
- The **Account Name** column displays the account name of the critical customer the contact is already associated with.
- The **Account Number** column displays the account number of the critical customer the contact is already associated with.
- The **Add** button associates the selected contact with the currently displayed critical customer, including contacts and contact phone entries, adds a row for this contact to the Customer Contacts table, and closes the Search Customer Contacts dialog.
- The **Cancel** button closes the Search Customer Contacts dialog.


## Searching for a Customer Contact in Service Alert

To search for a customer contact, complete these steps:

1. Add an account or search for an account.
2. Click the **Search** button. The Search Customer Contacts dialog opens.
3. Select a search criterion on the **Search Parameter** drop menu.
4. Enter text into the **Search Text** field according to the search criterion selected in the previous step. Note that an asterisk (\*) serves as a wildcard.
5. Click the **Search** button to perform a search for customer contacts within Service Alert. The search result table populates with a set of customer data.
6. Select a customer contact by clicking on a row in the table.
7. Click **Add** to associate the customer contact with the critical customer currently displayed on the Utility Customer panel, or **Cancel** to avoid adding a contact.


## Editing Customer Contact Information

To edit customer contact information, complete these steps:

1. Search for an account that has customer contacts associated with it.
2. In the Customer Contacts section, click the **Edit** () button. The Add/Edit Contact dialog opens.
3. Edit the **Name**, **Title**, and **Instructions** associated with the customer contact. The **OK** button becomes enabled.
4. Click **OK** to save the edited customer contact information to the database or **Cancel** to avoid saving the information.


## Removing Customer Contact Information

To remove customer contact information, complete these steps:

1. Search for an account that has customer contacts associated with it.
2. Click on one of the existing contacts in the **Customer Contacts** table. The **Remove** button becomes enabled.
3. Click the **Remove** () button. The Remove Contact dialog opens.
4. Click **Yes** to remove the contact's association with this account, or **No** to avoid removing the contact association.


## Adding Customer Contact Phone Information

To add customer contact phone information, complete these steps:

1. Add an account or search for an account.
2. If the account does not have any associated contacts, add a customer contact.
3. Click on one of the existing contacts in the **Customer Contacts** table. The **Add** button becomes enabled.
4. Click the **Add** () button. The Add/Edit Customer Contact Phone dialog opens.
5. Select the type of phone and call time from the drop menu **Type** and **Call Time** drop menus.
6. Enter a phone number in the **Number** field. If applicable, a phone extension can be entered in the text field to the right of the Number field.
7. Enter a non-negative value in the Sequence field. This number is used to indicate the priority of this phone entry relative to all other phone entries associated with the selected customer contact. The **OK** button becomes enabled.
8. Click **OK** to save the customer contact phone information to the database, or **Cancel** to avoid saving the phone information.

## Editing Customer Contact Phone Information

To edit customer contact phone information, complete these steps:

1. Search for an account that has customer contacts associated with it.
2. Click on one of the existing contacts in the **Customer Contacts** table. The **Edit** button becomes enabled.
3. Click the **Edit** () button. The Add/Edit Customer Contact Phone dialog opens.
4. Modify the selection the type of phone and call time from the drop menu **Type** and **Call Time** drop menus.

5. Edit a phone number in the **Number** field. Edit the phone extension in the text field to the right of the Number field.
6. Edit value in the **Sequence** field.
7. Click **OK** to save the customer contact phone information to the database, or **Cancel** to avoid saving the phone information.

## Removing Customer Contact Phone Information

To remove customer contact phone information, complete these steps:

1. Search for an account that has customer contacts associated with it.
2. Click on one of the existing contacts in the **Customer Contacts** table.
3. Click on one of the contact phone entries in the **Customer Contact Phones** table. The **Remove** button becomes enabled.
4. Click the **Remove** (✖) button. The Remove Phone dialog opens.
5. Click **Yes** to remove the contact's selected phone entry, or **No** to avoid removing the entry.

## Attribute Manager

The Attributes Manager tab is used to add, edit, or remove attribute information associated with specific devices. Attribute Information can be displayed on notifications trigger by the associated device. An attribute consists of a Device ID, Attribute ID, a name and a value. Inactive attributes cannot be violated, and therefore will never trigger a notification.

The Attributes Manager tab allows you to perform the following tasks:

- **Adding Attributes**
- **Editing a Attribute**
- **Removing a Attribute**

For a description of the fields and buttons on this tab, see the following topic.

### Attributes Manager Tab



The Attributes Manager tab displays the following fields and buttons:

- The **Attributes** panel lists all attributes known to Service Alert. Note that the table row colors correspond to whether a attribute is active (white) or inactive (bluish gray). For convenience, the rows in the table can be sorted in ascending or descending order by clicking on any column header.

The columns displayed are user selectable by right-clicking the table heading area and checking or unchecking the list of available columns in the **Select Columns to Display** dialog. Once the columns have been chosen, you may save the choices for your subsequent sessions by selecting **Save Preferences** from the **Preferences** menu; if not saved, the default columns will be displayed when you relogin. See **Preferences Menu** on page 6-3 for details on saving and restoring column selections.

The default product configuration displays the following columns:

- The **Device ID** column contains the device to which the attribute applies.
- The **Attribute Name** column contains a descriptive name given to the attribute.
- The **Attribute Value** column contains a value given to the attribute.
- The **Add** (+) button displays the Device Search dialog, allowing you to search for a device to associate with the attribute.



- The **Edit** () button allows you to edit the currently selected attribute.
- **Remove** () button removes the currently selected attribute from the Service Alert.

The **Attribute Information** panel is where the details for an attribute are entered and/or edited.

- The **Device ID** field displays the alias of the device to which the attribute applies.
- The **Attribute ID** field displays the system assigned internal id for the attribute.
- The **Attribute Name** field displays the descriptive name given to the attribute. This value can be modified be when in add/edit mode.
- The **Attribute Value** field displays the value given to the attribute. This value can be modified be when in add/edit mode.
- The **Active** checkbox allows you to enable/disable the attribute.
- The **Save** button saves the attribute information.
- The **Cancel** button cancels an add/edit attribute operation.


## Adding Attributes

An attribute consists of a name and a value associated to a device or customer. The attribute information can be displayed on notifications trigger by the associated device.

1. Click the **Attribute Manager** tab on the Service Alert Administration Tool.
2. Click the **Add** () button to bring up the Device Search dialog.
3. Enter into the **Search Text** field your search criteria. You may use an asterisk (\*) as a wildcard.
4. Click the **Search** () button. The search results are displayed in the table.
5. Select the desired device from the table, and then click the **OK** button. The Device Search dialog disappears, and the Device ID field is populated with the name of the selected device.
6. Enter a descriptive name for the attribute into the **Attribute Name** field.
7. Enter a value for the attribute into the **Attribute Value** field.
8. Select/deselect the **Active** checkbox as desired.
9. Click the **Save** button to save the attribute.

## Editing a Attribute

To edit an attribute, complete these steps:

1. Click the **Attribute Manager** tab on the Service Alert Administration Tool.
2. Click on one of the existing attributes in the **Attributes** table. The **Edit** button becomes enabled.
3. Click on the **Edit** () button. The appropriate fields will become enabled.
4. Edit each field as desired.
5. Click **Save** to save the edited information, or click **Cancel** to avoid saving the edited information.



## Removing a Attribute

To remove an attribute, complete these steps:

1. Click the **Attribute Manager** tab on the Service Alert Administration Tool.
2. Click on one of the existing attributes in the **Attributes** table. The **Remove** button becomes enabled.
3. Click the **Remove** (✖) button. The Remove Attribute dialog opens.
4. Click **Yes** to remove the attribute or **No** to avoid removing the attribute.

## Service Alert Notification Examples

Oracle Utilities Network Management System Service Alert sends the following types of notifications:

- **Unplanned Outage Affecting Critical Customers**
- **Unplanned Outage Affecting a Specific Customer**
- **Planned Outage Affecting Many Customers**
- **Storm Ended**
- **Frequency of Device Operations**

## Unplanned Outage Affecting Critical Customers

Below is a sample email message for an unplanned outage affecting critical customers. Details include: job# [1002] and device [F1111]; message generated at 06-04-2010 11:15:29.

### Critical Customer(s) Affected By Unplanned Outage Notification

Generated by Oracle Utilities NMS Service Alert on 06-04-2010 11:15:29

A Real Device Outage has been detected on device F1111 in the following location.

**Company:** OPAL  
**Region:** Stark  
**Branch:** Lake  
**Substation:** Lake Sub  
**Feeder:** 2414

The following summary information was provided for this event.

**Event Number:** 1002  
**Outage Type:** Real Device Outage  
**Outage Begin Time:** 06/04/10 11:15  
**Number of Calls Received:** 0  
**Total Number of Customers Affected:** 113  
**Emergency Customers Affected:** 3  
**Key Customers Affected:** 5  
**Medical Customers Affected:** 0

#### Critical Customer(s) Affected

Account Number	Client Type	Name	Address	Meter ID	EMR	KEY	MED	Contacts
2313150		ENTERPRISES INC PAVLAK	13090 CLEVELAND AVE NW, Lake Twp., OH, 44685	2200809	N	Y	N	N/A
2204952		MELLION LLC DRS	3451 EDISON ST NW, Lake Twp., OH, 44685	2204952	N	Y	N	N/A
9208904		OHIO LLC GIANT	13066 CLEVELAND AVE NW, Lake Twp., OH, 44685	2201212	N	Y	N	N/A
2201200		PROPERTIES LLC CLEARVIEW	3407 EDISON ST NW, Lake Twp., OH, 44685	2200179	N	Y	N	N/A
9208407		TRUST COMPANY OF NORTHEASTERN OHIO CENTRAL	13100 CLEVELAND AVE NW, Lake Twp., OH, 44685	2202401	N	Y	N	N/A
2280020		VOLUNTEER FIRE DEPT UNIONTOWN	EDISON ST NW, Lake Twp., OH, 44685	2280018	Y	N	N	N/A
2280020		VOLUNTEER FIRE DEPT UNIONTOWN	NORTHDALE ST NW, Lake Twp., OH, 44685	2280019	Y	N	N	N/A
2280020		VOLUNTEER FIRE DEPT UNIONTOWN	13055 OAKWOOD AVE NW, Lake Twp., OH, 44685	2280020	Y	N	N	N/A

#### Violated Parameter(s)

ID	Name	Threshold Value (Number of customers affected)	Parameter Device Alias	Parameter Control Zone	Disabled During Storm	Associated Group
2	Unplanned outage affecting 5 critical customers	5		OPAL	N	doc

#### Group(s) Notified

doc

#### Individual(s) Notified

ID	Name	Type	Address
2	Jan Somers	E-Mail	jan.somers@oracle.com
3	Andrei Berezin	E-Mail	andrei.berezin@oracle.com
2	Jan Somers	Pager	jan.somers@oracle.com
3	Andrei Berezin	Pager	andrei.berezin@oracle.com

## Unplanned Outage Affecting a Specific Customer

Below is a sample email message for an unplanned outage affecting a specific customer with ERT updated. Details include: ERT Updated to 06/04/10 14:28, job#[1003], device [T14467], and account(s)[2201130]; message generated at 06-04-2010 11:28:06.

### ERT Updated for Unplanned Outage affecting Specific Customer(s) Notification

Generated by Oracle Utilities NMS Service Alert on **06-04-2010 11:28:06**

The Estimated Restoration Time has been updated for the Probable Service Outage on device **T14467** in the following location.

**Company:** OPAL  
**Region:** Stark  
**Branch:** Lake  
**Substation:** Lake Sub  
**Feeder:** 2414

The following summary information was provided for this event.

**Event Number:** 1003  
**Outage Type:** Probable Service Outage  
**Outage Begin Time:** 06/04/10 11:27  
**Updated Estimated Restoration Time:** 06/04/10 14:28  
**Previous Estimated Restoration Time:** 06/04/10 13:27  
**Number of Calls Received:** 1  
**Total Number of Customers Affected:** 1  
**Emergency Customers Affected:** 0  
**Key Customers Affected:** 0  
**Medical Customers Affected:** 0

#### Customer(s) Affected

Account Number	Client Type	Name	Address	EMR	KEY	MED	Contacts
2201130		KENNETH L RINEHART	3650 BROAD VISTA ST NW, Lake Twp., OH, 44685	N	N	N	N/A

#### Violated Parameter(s)

ID	Name	Account Number	Disabled During Storm	Associated Group
3	ERT updated for a specific customer	2201130	N	doc

#### Device Attribute(s)

Attribute ID	Attribute Name	Attribute Value
--------------	----------------	-----------------

#### Group(s) Notified

doc

#### Individual(s) Notified

ID	Name	Type	Address
2	Jan Somers	E-Mail	jan.somers@oracle.com
3	Andrei Berezin	E-Mail	andrei.berezin@oracle.com
2	Jan Somers	Pager	jan.somers@oracle.com
3	Andrei Berezin	Pager	andrei.berezin@oracle.com

## Planned Outage Affecting Many Customers

Below is a sample email message for a planned outage affecting many customers (customer scheduled). Details include: job#[1004] and device [F1236]; message generated at 06-04-2010 11:40:32.

### Scheduled Planned Outage Notification

Generated by Oracle Utilities NMS Service Alert on 06-04-2010 11:40:32

A Switching Job, with associated device **F1236**, has been scheduled in the following location.

**Company:** OPAL  
**Region:** Stark  
**Branch:** Lake  
**Substation:** Lake Sub  
**Feeder:** 2414

The following summary information was provided for this event.

**Event Number:** 1004  
**Outage Type:** Switching Job  
**Switch Plan Number:** 1011  
**Switch Plan Scheduled Begin Time:** 06/05/10 11:38  
**Switch Plan Scheduled End Time:** 06/06/10 11:38  
**Total Number of Customers Affected:** 83  
**Emergency Customers Affected:** 0  
**Key Customers Affected:** 0  
**Medical Customers Affected:** 0

#### Customer(s) Affected

Account Number	Client Type	Name	Address	EMR	KEY	MED	Contacts
2201135		ALFRED D + PAULINE A LAYFIELD	13233 PARKVIEW AVE NW, Lake Twp., OH, 44685	N	N	N	N/A
2204050		ANDREW M BROWN	3871 EDISON ST NW, Lake Twp., OH, 44685	N	N	N	N/A
2201313		ANNE M NUDO	3880 HUGH ST NW, Lake Twp., OH, 44685	N	N	N	N/A
2200748		ANTHONY P + WAITLEY MELISSA N PALMERI	3803 EDISON ST NW, Lake Twp., OH, 44685	N	N	N	N/A
2204682		BARRY A + DEBRA L BODINE	EDISON ST NW, Lake Twp., OH, 44685	N	N	N	N/A
2201314		BARRY J + KELLY A CARLSON	13358 JAYNEVIEW AVE NW, Lake Twp., OH, 44685	N	N	N	N/A

...

2200228		WILLIAM HOMA	13324 PARKVIEW AVE NW, Lake Twp., OH, 44685	N	N	N	N/A
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#### Violated Parameter(s)

ID	Name	Threshold Value (Number of customers affected)	Parameter Device Alias	Parameter Control Zone	Disabled During Storm	Associated Group
4	Planned outage affecting 50 customers is scheduled	50		OPAL	N	doc

#### Device Attribute(s)

Attribute ID	Attribute Name	Attribute Value
--------------	----------------	-----------------

#### Group(s) Notified

doc

#### Individual(s) Notified

ID	Name	Type	Address
2	Jan Somers	E-Mail	jan.somers@oracle.com

## Storm Ended

Below is a sample Storm Ended email message. Details include: Storm Hurricane Bob - 06/04/10  
Ended in OPAL/Stark/Canton; message generated at 06-04-2010 11:45:55.

### Storm "Hurricane Bob - 06/04/10" Ended

*Generated by Oracle Utilities NMS Service Alert on 06-04-2010 11:45:55*

#### Storm Details

Category: Hurricane - Major Storm

Zone: OPAL/Stark/Canton

Begin Time: 06/04/10 11:43

End Time: 06/04/10 11:45

#### Violated Parameter(s)

ID	Name	Parameter Control Zone	Associated Group
5	Storm Ended in Canton	OPAL/Stark/Canton	doc

#### Group(s) Notified

doc

#### Individual(s) Notified

ID	Name	Type	Address
2	Jan Somers	E-Mail	jan.somers@oracle.com
3	Andrei Berezin	E-Mail	andrei.berezin@oracle.com
2	Jan Somers	Pager	jan.somers@oracle.com
3	Andrei Berezin	Pager	andrei.berezin@oracle.com

## Frequency of Device Operations

Below is a sample email message for a Frequency of outages on a device notification. Details include: Violation parameter ID = 6; message generated on 06-04-2010 11:50:29.

### Frequency of Outages on a Device Notification (Real-time)

Generated by Oracle Utilities NMS Service.Alert on 06-04-2010 11:50:29

An outage, surpassing a parameter value, has been detected on device **T11430** in the following location.

**Company:** OPAL  
**Region:** Stark  
**Branch:** Lake  
**Substation:** Lake Sub  
**Feeder:** 2414

Violated Parameter(s)

ID	Name	Threshold Value (Number of service interruptions)	Parameter Time Interval	Parameter Begin Date	Parameter Device	Parameter Device Class	Parameter Control Zone	Associated Group
6	Three outages on the same transformer in one day	3	1 day(s)			transformer (200)	OPAL	doc

Device Attribute(s)

Attribute ID	Attribute Name	Attribute Value
--------------	----------------	-----------------

**Group(s) Notified**  
doc

Individual(s) Notified

ID	Name	Type	Address
2	Jan Somers	E-Mail	jan.somers@oracle.com
3	Andrei Berezin	E-Mail	andrei.berezin@oracle.com
2	Jan Somers	Pager	jan.somers@oracle.com
3	Andrei Berezin	Pager	andrei.berezin@oracle.com

# Chapter 7

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## Management Reporting

The management reporting modules were designed specifically to meet the challenges of measuring, monitoring, and reporting performance of electric distribution operations. Considerable design and implementation guidance from the user community was incorporated into these modules, resulting in powerful, easy-to-use measuring, monitoring, and reporting tools.

A set of standard Trouble reports are available in either Oracle Business Intelligence Discoverer or Oracle Business Intelligence Publisher. These Trouble reports reflect the information that executives and regulatory agencies typically require from a utility's operations systems.

This chapter also describes the Oracle Business Intelligence for Utilities graphical portals and zones, which operators can use to view key performance indicators and other pertinent information relating to the operation of the distribution network.

This chapter includes the following topics:

- **Overview of Management Reporting**
- **Using Oracle Business Intelligence Discoverer**
- **Using Oracle Business Intelligence Publisher**
- **Trouble Reporting Reports**
- **Using the Oracle Business Intelligence for Utilities Graphical Portals and Zones**

### Overview of Management Reporting

Oracle Business Intelligence for Utilities (OBIU) is the base Oracle Utilities Network Management System reporting module, a specially tuned data warehouse with Extraction, Transformation, and Load (ETL) capabilities for capturing information common to all of the Oracle Utilities applications.

The Oracle Utilities Network Management System Trouble Reporting module provides multiple Business Intelligence (BI) reporting tools (Oracle Business Intelligence Discoverer, and Oracle Business Intelligence Publisher) to display trouble information from OBIU. These reports are a starter kit of historical trouble information and performance measures based upon reliability indices, used with widely accepted third party Business Intelligence tools, as well as support for related ad hoc analysis and reporting.

The reporting tools are used as a means for generating reports and performing analysis on the information. As a result, you can easily interact with a variety of data sources by using a simple graphical interface, thus avoiding the technical complexity of relational databases.

## Using Oracle Business Intelligence Discoverer

This section covers Oracle Business Intelligence Discoverer. This section includes the following topics:

- **Defining Reports**
- **Running Reports**
- **Editing and Drilling Down in Reports with Oracle Business Intelligence Discoverer**

### Defining Reports

To define a new report with Oracle Business Intelligence Discoverer, complete the following steps:

1. Start up Oracle Business Intelligence Discoverer. The Connect to Oracle Business Intelligence Discoverer dialog appears.
2. Enter the RDBMS username in the **Username** field.
3. Enter the RDBMS password in the **Password** field.
4. Enter the Oracle instance name in the **Connect** field.
5. Press the **Connect** button. The Workbook Wizard opens.
6. Complete the Workbook Wizard: Step 1 Dialog:
  - Click the **Create a new workbook** button to define a report. The 'How do you want to display the results?' section now appears on the dialog.
  - Click one of the following four buttons: **Table**, **Crosstab**, **Page-detail Table**, or **Page-detail Crosstab**.  
**Note:** Please refer to the Oracle Discoverer documentation for information about these buttons.
  - Click the **Next** button.
7. Complete the Workbook Wizard: Step 2 dialog to select the content for your report:
  - Select specific information from the Available list.
  - Click the button with the **arrow** pointing to the right. The selected item moves to the Selected field. Repeat this process until you have all of the desired information.
  - Click the **Next** button.
8. Complete the Workbook Wizard: Step 3 dialog appears to arrange how the items are displayed in your report.
  - Click on the column item and drag it to the desired location.
  - Click the **Next** button.
9. Complete the Workbook Wizard: Step 4 dialog to limit the amount of data in your report by applying a filter. For additional information on Conditions, please refer to the Oracle Discoverer documentation.
  - To create a new condition, click the **New...** button. The New Condition dialog displays.
  - Enter a name for the condition in the **Name** field, or select the **Generate name automatically** checkbox to let Oracle Business Intelligence Discoverer name it.
  - Enter a description of the condition in the **Description** field.
  - Select the type of condition in the **Condition** drop-down menu.
  - Select the value(s) in the **Value(s)** drop-down menu.



- Optionally, you can view, edit, and delete existing conditions.
  - Click the **OK** button. The Workbook Wizard: Step 4 dialog displays again.
  - Click the **Next** button.
10. Complete Workbook Wizard: Step 5 dialog to define a sort to arrange the data in your report in a particular order.
- Select your sort order from the **Add** drop-down menu. The selected sort criteria displays in the field above.
  - In the **Direction** column, select how the data should be sorted, such as ascending or descending order.
  - Click the **Next** button.
11. Complete the Workbook Wizard: Step 6 dialog to view, edit, delete, and create new calculations for individual items in your report. Please refer to the Oracle Business Intelligence Discoverer documentation for more information about calculations.
- To create a new calculation, click the **New...** button. The Edit Calculation dialog displays.
  - Select the corresponding radio button to show **Items** or **Functions** in the field below.
  - Select the item or function to be used in the calculation.
  - Click the **Paste** button. The item or function will display in the Calculation field.
  - Use the buttons below the Calculation field to define the mathematical operation to be performed on the function or item. Mathematical operations include multiplication, addition, and division.
  - Repeat the previous 3 steps until you have completed defining the new calculation.
  - Enter the name of the calculation in the **Name** field.
  - Click the **OK** button. The Workbook Wizard: Step 6 dialog displays again.
12. Click the **Finish** button. The report displays.

## Running Reports

To run a report with Oracle Discoverer, complete these steps:

1. Start up Oracle Discoverer. The Connect to Oracle Business Intelligence Discoverer dialog appears.
2. Enter the RDBMS username in the **Username** field.
3. Enter the RDBMS password in the **Password** field.
4. Enter the Oracle instance name in the **Connect** field.
5. Press the **Connect** button. The Workbook Wizard opens.
6. Click the **Open an existing workbook** button. The ‘Where is the workbook you want to open?’ section now appears on the dialog.
7. Click one of the following four buttons: **My Computer**, **Database**, **Scheduling Manager**, **Recently Used List**. Please refer to the Oracle Business Intelligence Discoverer documentation for information about these buttons.
8. Click the **Next** button. The Open dialog appears. The Open dialog is used to access the particular report you want to see.
9. Select the folder in the Look in field. The files within the selected folder display in the field below.

10. Select the report by double-clicking it. Whether or not the Workbook in Other Database Account dialog displays depends on your system configuration.
11. If the dialog does display, select the **Open the workbook in the current database account** radio button. This option accesses the workbook with your username and the Oracle instance you're connected to.
12. Click the **OK** button. The Oracle Business Intelligence Discoverer window below displays.
13. Click the **Yes** button to run the query. The Parameter Wizard opens. The Parameter Wizard is used to define the beginning and ending date for the data in your report. The Description field displays a description of the parameters when you click in its field. To enter the parameters for a report, follow these steps.
  - Enter the start date in the **Enter Start date** field.
  - Enter the end date in the **Enter End date** field.
  - Click the **Finish** button. The report opens.

## Editing and Drilling Down in Reports with Oracle Business Intelligence Discoverer

Oracle Business Intelligence Discoverer gives you the capability to change some aspects within the reports. For example, you can edit the column headings in a report. To change the column headings, follow these steps.

### Editing Column Headings

To edit column headings:

1. Right-click in the column heading you want to change. A menu displays.
2. Select the **Item Properties...** menu option. The Item Properties dialog displays.
3. In the **Heading** field, enter the desired name of the column heading.
4. Click the **OK** button.
5. Select **Save** from the File menu to save the new column headings.

Please refer to the Oracle Discoverer documentation for more information on Oracle Business Intelligence Discoverer editing features.

### Drilling Down or Up in Reports

“Drilling down” refers to viewing more detailed information within a report, and “drilling up” refers to viewing more general information. To drill down or up, complete these steps:

1. Select **Drill...** from the Sheet menu. The Drill dialog displays.
2. Select the **Drill Up/Down** radio button. The **Where do you want to drill from?** field auto-fills with the currently selected column name.
3. Select the column or level of detail you want to drill down to in the **Where do you want to drill to?** field.
4. Click the **OK** button.

Please refer to the Oracle Business Intelligence Discoverer documentation for more information about drilling features.

# Using Oracle Business Intelligence Publisher

This section covers Oracle Business Intelligence Publisher. For information about Oracle Business Intelligence Discoverer, please refer to **Using Oracle Business Intelligence Discoverer** on page 7-2.

This section includes the following topics:

- **Defining Reports**
- **Running a Report**

## Defining Reports

To generate a standard report in Oracle Business Intelligence Publisher, follow these steps:

1. Make sure the Oracle Business Intelligence Publisher Server has been started. If not yet started, go to the Oracle BI Publisher site and login.
2. Click the **Reports** tab.
 

**Note:** Before you create a new report, you may want to create a new folder to contain the reports to be created. Click the **Create a new folder link** to create a new folder.
3. Click the **Create a new report** link.
4. Specify the report name. A new report icon with the specified name appears on the webpage.
5. Click the **Edit** link of the newly created report.
6. Add a **Description** of the report and define a **Default Data Source**.

**Note:** Users with Administrator role access can add Data Source values. Make sure that the Oracle Business Intelligence Publisher administrator has already set up the correct Data Sources.

### Setting up the Data Model

7. Click the **Data Model** link on the tree structure. A drop-down opens, displaying all the data sets that have been created.
8. Click the **New** icon to create a new Data Set to be used for the report.
9. Provide the following information:
  - **Name** – Select a value from the drop-down.
  - **Type** – Select the mode type, such as SQL Query, Data Template, Web Service, or XML Feed. Oracle Utilities Network Management reports are defined as Data Templates.
  - Depending on the Type selected, more attributes need to be set up to define where the data will come from. For example, a Data Template data set includes the SQL query used to retrieve the columns and also the output XML structure.

### Defining the List of Values

10. Click the **List of Values** link to define a List of Values. This is only necessary if you have a predefined set of values that need to be supplied to a report.

### Defining Report Parameters

11. Click the **Parameters** link to define report parameters.
12. Click the **New** icon to create a new report parameter.
13. Provide the following information:

- **Identifier** – This is the name of the parameter. Parameters are referenced in the SQL Query statements, Data Templates etc. through this Identifier.
- **Data Type** – A parameter can only be a String, Integer, Boolean, Date or Float data type.
- **Default Value** - The default value for this parameter.
- **Parameter Type** – A parameter can be any of the following:
  - **Text** – Use this if you need a text box to input the parameter values.
  - **Menu** – Use this if there is pre-defined list of values that can be supplied to the report. A drop-down menu will be available to input values.
  - **Date** – Use this if the parameter is a date. A calendar will be available to input values. This ensures that only valid dates can be entered.
  - **Hidden** – Use this if the user does not need to see the actual value of the parameter.
- **Display Label** - The label to display for this parameter.
- Other attributes may need to be setup depending on the Parameter Type selected.

### Defining Layouts

14. Click the **Layouts** link to define the templates that can be used on the report.
15. Click the **New** icon to create a new layout.
16. Provide the following information:
  - **Name** - Enter a name for the layout.
  - **Template** - Select a template from the drop-down list of available template files for this report.

**Note:** To add a new template, click the Layouts link and upload templates from the directory folder using the Browse and Upload buttons.
  - **Template Type** - The example reports provided have corresponding RTF templates. However, there are other template types that available (*e.g.*, PDF, Excel, XML, etc.).
  - **Output Format** - The output format to use.

### Save

17. Click **Save** to commit your changes.

Once you've defined a new report, you can run the report to see the output.

## Running a Report

To run a previously defined report in Oracle Business Intelligence Publisher, complete these steps:

1. Click the Reports tab. Go to the reports folder of the report you want to run.
2. Click the **View** link to run the report. The output is always based on the following:
  - **Parameters** – There is a section on the page where the user can input parameter values. It is always populated with the default values (if defined).
  - **Template** – There is a drop-down list of the available templates for the report. The report is always presented in the template currently selected by the user.

**Note:** You can click the **View** button again at any time to rerun the report again.

- When the page has completely loaded in the web browser, click the **Export** button to save the output. Depending on the selected template, a related application will be launched (*e.g.*, MS Word will be launched for an RTF template).

## Trouble Reporting Reports

The Oracle Utilities Network Management System – Trouble Reporting module gathers pertinent information about completed outages from the Oracle Utilities Business Intelligence Data Warehouse and calculates performance measures of the distribution system. The information gathered consists of historical data from various areas such as causes, devices, outage times, call details, crew details, and customer details. In addition to reports of trouble-related information, Trouble Reporting includes reports of performance measures based on reliability indices.

This section describes the following reports:

- **Outage Summary**
- **Critical Customers Outages**
- **Daily Trouble Report**
- **Device Outage History**
- **Sustained Outage Summary**
- **Recurring Device Outages**
- **Reliability Indices Reports**

### Outage Summary

The Outage Summary reflects outage causes while displaying the number of customer interruptions and customer minutes of duration. You can organize it by company or region. Each row displays a cause, while the columns display the report categories.

The Outage Summary displays the following columns:

- The **Company** column contains the name of the company that serves the customer.
- The **Outage Cause** column contains the primary cause of the outage as determined from the drop-down selections in the Oracle Utilities Network Management System – Trouble Management or Oracle Utilities Network Management System – Web Trouble Event Details window. This is useful for filtering, sorting, and analyzing outage causes. The logic used in determining the primary cause is the same as what is used for the **Daily Trouble Report**. The **Outages** column contains the total number of outages during the specified period for the cause in the specified area.
- The **Cust Out** column contains the total number of customers experiencing outages during the specified period for the cause in the specified area.
- The **Customer Minutes Interrupted** column contains the sum of the customers affected multiplied by the outage duration for each outage during the specified period for the cause in the specified area.

### Critical Customers Outages

The Critical Customers Outages report displays the duration (in minutes) of the outage for the critical customer. It contains the following columns:

- The **Company** column contains the name of the company that serves the customer.
- The **Region** column contains the name of the region that serves the customer.
- The **Branch** column contains the name of the branch that serves the customer.

- The **Substation** column contains the name of the substation that serves the customer.
- The **Feeder** column contains the name of the feeder that serves the customer.
- The **Per Name** column contains the name of the customer who experienced an outage during the specified period for the specified area.
- The **Customer Minutes Interrupted** column contains the sum of each outage duration (in minutes) during the specified period for the customer.
- The **Medical** column indicates whether the customer is a medical customer.
- The **Key** column indicates whether the customer is a key customer.
- The **Critical** column indicates whether the customer is an emergency customer.

## Daily Trouble Report

The Daily Trouble Report displays events on a daily basis. It identifies the crew, hours worked, resolution and primary cause. Each column is organized by the report categories.

This report contains the following columns:

- The **Region** column contains the name of the region where the outage is located.
- The **Branch** column contains the name of the branch where the outage is located.
- The **Substation** column contains the name of the substation where the outage is located.
- The **Feeder** column contains the name of the feeder where the outage is located.
- The **Exclude?** column indicates whether the outage is excluded from the reliability indices calculations (Y = excluded; N = not excluded).
- The **Event #** column contains the system identification number for the outage.
- The **Location of First Call** column contains the address of the first call received for the outage.
- The **Outage Trouble Code** column contains the clues associated with the outage.
- The **Device Name** column contains the name of the interrupting device associated with the outage.
- The **Outage Began Date** column contains the date and time the outage began.
- The **Outage Restored Date** column contains the date and time the outage was restored.
- The **Outage Duration (Minutes)** column contains the duration of the outage (in minutes).
- The **Cust Out** column contains the number of customers affected by the outage.
- The **Remedy** column contains the action take to resolve the outage, as entered in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window.
- The **Event Note** column contains the operations event note associated with the outage.
- The **Crew Contact** column contains the name of the crew leader for the crew associated with the outage, if any.
- The **Crew Dur** column contains the duration between the time the crew accepted the assignment and the time the crew arrived at the outage location (in minutes).
- The **Cause of Outage** column contains the primary cause of the outage as determined from the drop-down selections in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window. This is useful for filtering, sorting, and analyzing outage causes.

The logic used in determining the primary cause is shown in the following table:

Weather	Environ- ment	Vegetation	Foreign Interference	Defective Equipment	Scheduled	Utility Error	Other	Use as Cause of Outage
any	any	any	any	any	selected	any	any	Scheduled
any	any	any	any	any	unselected	selected	any	Utility Error
any	any	any	any	any	unselected	unselected	selected	Other
any	any	any	selected	any	unselected	unselected	unselected	Foreign Interference
any	any	selected	unselected	any	unselected	unselected	unselected	Vegetation
any	any	unselected	unselected	selected	unselected	unselected	unselected	Defective Equipment
any	selected	unselected	unselected	unselected	unselected	unselected	unselected	Environment
selected	unselected	unselected	unselected	unselected	unselected	unselected	unselected	Weather
unselected	unselected	unselected	unselected	unselected	unselected	unselected	unselected	none

- The **Scheduled** column contains the value selected from the Scheduled drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating whether the outage was scheduled or not.
- The **Utility Error** column contains the value selected from the Utility Error drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any utility error associated with the outage.
- The **Other** column contains the value selected from the Other drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any other characteristics associated with the outage.
- The **Foreign Interference** column contains the value selected from the Foreign Interference drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any foreign interference associated with the outage.
- The **Vegetation** column contains the value selected from the Vegetation drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any vegetation conditions associated with the outage.
- The **Defective Equipment** column contains the value selected from the Defective Equipment drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any defective equipment associated with the outage.
- The **Environment** column contains the value selected from the Environment drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any environmental conditions associated with the outage.
- The **Weather** column contains the value selected from the Weather drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any weather conditions associated with the outage.

## Device Outage History

The Device Outage History displays the history of outages for a selected device during a selected period. A summarization of the customer interruptions, customer minutes interrupted and number of events for each distinct interrupting device and each distinct interrupting device type is also displayed.

This report contains the following columns:

- The **Device Name** column contains the name of the interrupting device.
- The **Exclude?** column indicates whether the outage is excluded from the reliability indices calculations (Y = excluded; N = not excluded).
- The **Location of First Call** column contains the address of the first call received for the outage.
- The **Outage Began Date** column contains the date and time the outage began.
- The **Outage Restored Date** column contains the date and time the outage was restored.
- The **Customer Interruptions** column contains the total number of customers affected by the outage.
- The **Customer Minutes Interrupted** column contains the sum of the customers affected by the outage multiplied by the outage duration.
- The **Event #** column contains the system identification number for the outage.
- The **Remedy** column contains the action taken to resolve the outage, as entered in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window.
- The **Event Note** column contains the operations event note associated with the outage.
- The **Cause of Outage** column contains the primary cause of the outage as determined from the drop-down selections in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window. This is useful for filtering, sorting, and analyzing outage causes. The logic used in determining the primary cause is the same as what is used for the **Daily Trouble Report** on page 7-8.
- The **Scheduled** column contains the value selected from the Scheduled drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating whether the outage was scheduled or not.
- The **Utility Error** column contains the value selected from the Utility Error drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any utility error associated with the outage.
- The **Other** column contains the value selected from the Other drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any other characteristics associated with the outage.
- The **Foreign Interference** column contains the value selected from the Foreign Interference drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any foreign interference associated with the outage.
- The **Vegetation** column contains the value selected from the Vegetation drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any vegetation conditions associated with the outage.
- The **Defective Equipment** column contains the value selected from the Defective Equipment drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any defective equipment associated with the outage.



- The **Environment** column contains the value selected from the Environment drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any environmental conditions associated with the outage.
- The **Weather** column contains the value selected from the Weather drop-down in the Oracle Utilities Network Management System Trouble Management or Web Trouble Event Details window, indicating any weather conditions associated with the outage.

## Sustained Outage Summary

The Sustained Outage Summary displays the total sustained outages and the customers interrupted for a specified period, organized by region.

- This report displays the following columns:
- The **Company** column contains the name of the company where the outages are located.
- The **Region** column contains the name of the region where the outages are located.
- The **Branch** column contains the name of the branch where the outages are located.
- The **Substation** column contains the name of the substation where the outages are located.
- The **Feeder** column contains the name of the feeder where the outages are located.
- The **Outages** column contains the total number of outages in the specified area during the specified period.
- The **Cust Out** column contains the total number of customers experiencing outages during the specified period in the specified area.
- The **Customer Minutes Interrupted** column contains the sum of the customers affected multiplied by the outage duration for each outage during the specified period in the specified area.

## Recurring Device Outages

The Recurring Device Outages report identifies interrupting devices that have been associated with a specified number or more sustained and momentary outages. This report displays all device outages for the period requested and is organized by the report categories. A summarization of the information for all of the devices on each distinct feeder is also displayed.

This report displays the following columns:

- The **Company** column contains the name of the company where the outages are located.
- The **Region** column contains the name of the region where the outages are located.
- The **Branch** column contains the name of the branch where the outages are located.
- The **Substation** column contains the name of the substation where the outages are located.
- The **Feeder** column contains the name of the feeder where the outages are located.
- The **Device Type** column contains the device type of the interrupting device on which the outages are located.
- The **Total Outages** column contains the total number of outages on the device during the specified period.
- The **Total Duration** column contains the total duration of outages on the device experiencing outages during the specified period.
- The **Customer Minutes Interrupted** column contains the sum of the customers affected multiplied by the outage duration for each outage on the device during the specified period.

## Reliability Indices Reports

The reliability indices (SAIDI, SAIFI, CAIDI, etc.) are calculated values that provide a measure of the reliability of the distribution system. These reports contain three main categories of reports: Sustained Interruptions, Momentary Interruptions, and Sustained and Momentary Interruptions. In each report, each column is organized by report categories.

For more information about reliability indices, refer to the IEEE Std 1366-2003.

### Feeder Reports

There are two types of sustained interruptions reports:

- Customers Experiencing Multiple Interruptions (CEMI)
- Average Service Availability Index (ASAI), System Average Interruption Frequency Index (SAIFI), System Average Interruption Duration Index (SAIDI), Customer Average Interruption Duration Index (CAIDI), Customer Average Interruption Frequency Index (CAIFI)

### Index Report

The Index report displays the ASAI, SAIFI, SAIDI, CAIDI, CAIFI, MAIFI, MAIFIE, ACI, MSAIFI, CEMI and CEMSMI calculations for a specified period by feeder. (See descriptions of each calculation in the following paragraphs.)

The Index Report displays the following columns:

- The **Company** column contains the name of the company where the outages are located.
- The **Region** column contains the name of the region where the outages are located.
- The **Branch** column contains the name of the branch where the outages are located.
- The **Substation** column contains the name of the substation where the outages are located.
- The **Feeder** column contains the name of the feeder where the outages are located.
- The **ASAI** column contains the Average Service Availability Index value for the feeder. This is the fraction of time that a customer has received power during the specified period.
- The **SAIFI** column contains the System Average Interruption Frequency Index value for the feeder. This indicates how often the average customer experienced a sustained interruption during the specified period.
- The **SAIDI** column contains the System Average Interruption Duration Index value for the feeder. This indicates the total duration of interruption, in minutes, for the average customer during the specified period.
- The **CAIDI** column contains the Customer Average Interruption Duration Index value for the feeder. This represents the average time required to restore service to those customers experiencing sustained interruptions during the specified period.
- The **CAIFI** column contains the Customer Average Interruption Frequency Index value for the feeder. This gives the average frequency of sustained interruptions for those customers experiencing sustained interruptions during the specified period for the specified area. The customer is counted once regardless of the number of times interrupted for this calculation.
- The **MAIFI** column contains the Momentary Average Interruption Frequency Index value for the feeder. MAIFI indicates how often the average customer experienced a momentary interruption during the specified period.
- The **MAIFIE** column contains the Momentary Average Interruption Event Frequency Index value for the feeder. This indicates how often the average customer experienced a momentary interruption event during the specified period. It does not include momentary interruptions immediately preceding a lockout.

- The **ACI** column contains the Average Number of Customers per Interruption value for the feeder. This indicates the average number of customers interrupted for each interruption (sustained or momentary) during the specified period for the specified area.
- The **MSAIFI** column contains the Momentary and Sustained Average Interruption Frequency Index value for the feeder. This indicates how often the average customer experienced a momentary and sustained interruption during the specified period.
- The **CEMI** column contains the Customers Experiencing Multiple Interruptions value for the feeder. This indicates the ratio of individual customers experiencing more than 3 sustained interruptions to the total number of customers served.
- The **CEMSMI** column contains the Customers Experiencing Multiple Sustained and Momentary Interruption Events value for the feeder. This is the ratio of individual customers experiencing more than 3 of both sustained and momentary interruption events to the total customers served. Its purpose is to help identify customer issues that cannot be seen using averages.

### Indices by City

There is also a report that displays all of the Indices calculations for a specified period by city, state and country rather than by feeder.

This report displays the following columns:

- The **City** column contains the name of the city where the outages are located.
- The **CEMI** column contains the Customers Experiencing Multiple Interruptions value for the city.
- The **ASAI** column contains the Average Service Availability Index value for the city.
- The **SAIFI** column contains the System Average Interruption Frequency Index value for the city.
- The **SAIDI** column contains the System Average Interruption Duration Index value for the city.
- The **CAIDI** column contains the Customer Average Interruption Duration Index value for the city.
- The **CAIFI** column contains the Customer Average Interruption Frequency Index value for the city.
- The **MAIFI** column contains the Momentary Average Interruption Frequency Index value for the city.
- The **MAIFIe** column contains the Momentary Average Interruption Event Frequency Index value for the city.
- The **ACI** column contains the Average Number of Customers per Interruption value for the city.
- The **MSAIFI** column contains the Momentary and Sustained Average Interruption Frequency Index value for the city.
- The **CEMI** column contains the Customers Experiencing Multiple Interruptions value for the city.
- The **CEMSMI** column contains the Customers Experiencing Multiple Sustained and Momentary Interruption Events value for the city.

# Using the Oracle Business Intelligence for Utilities Graphical Portals and Zones

Oracle Business Intelligence for Utilities provides a robust tool for remote, near-real-time monitoring of critical distribution operations processes and decision support for day-to-day operations and major events. Presentation, navigation, and control of information are managed in a way that makes sense to the business user. Access buttons permit navigation to different portals containing information zones about events, crews, calls, devices, and customers. User-driven data slicing and drill-down is provided for most information zones. Other access buttons provide a mechanism for the user to drill down to different levels of control zone hierarchy or select geographical/regional display of the data.

General installation, configuration, and use of Oracle Business Intelligence for Utilities are covered in the Oracle Business Intelligence for Utilities documentation. As an addendum to that guide, we are documenting here the sample Oracle Utilities Network Management System Business Intelligence portals and zones which are provided. Users can configure new zones and edit zones as described in the Oracle Business Intelligence for Utilities documentation.

## Business Intelligence Login Screen

Access the Oracle Business Intelligence for Utilities login window by entering the appropriate URL web address. The Oracle Business Intelligence for Utilities intro screen opens.

To login to Business Intelligence, complete these steps:

1. Enter your user name in the User Id field.
2. Enter your password name in the Password field.
3. Click the **Login** button. After you log in, the default window opens.

## Navigating in Business Intelligence

A menu bar appears on the left-hand side of the window. Click the menu bar to open the menu.

Move the mouse pointer over the NMS Analytics menu item to display the sample Oracle Utilities Network Management System portals that are available.

Each of the items in the sub-menu is a **portal** containing information related to that topic. Each portal contains one or more **zones** that present specific data for that topic. Different zones may display the same data, but the data may appear in a different format.

The remainder of this document describes each of the available portals and the zones contained in each portal. Available portals are:

- **OMS Executive Overview Portal**
- **Current Outages By Operating Region Portal**
- **Customer Restoration Portal**
- **Outage Analysis Portal**
- **Outages By Political Boundary Portal**
- **Feeder Performance Portal**
- **Sustained Reliability Limits Portal**
- **Monthly Reliability Limit Portal**
- **Current Feeder Lockouts Portal**
- **Current Feeder Lockouts Portal**
- **Momentary Reliability Limit Portal**

- **Wire Down Event Portal**
- **Feeder Delivered Load Portal**
- **Historical Storms Portal**

## **OMS Executive Overview Portal**

The Executive Overview Portal provides the following zones:

- **Critical Customer Overview Zone**
- **Current Customers Out Zone**
- **Current City Outage Summary Zone**
- **Current OMS Overview Zone**
- **Recent Call Volume Zone**

### **Critical Customer Overview Zone**

This zone lists each type of critical customer configured in the model, along with a counter and a red/yellow/green stoplight indicator for the number currently out of service.

### **Current Customers Out Zone**

This zone displays a pie chart of current outages by control zone branch (the third highest grouping in the control zone hierarchy).

### **Current City Outage Summary Zone**

This zone shows a pie chart of current outages by city.

### **Current OMS Overview Zone**

This zone shows a red/yellow/green stoplight and a counter of the total number of customers out of service, the number of events, and the current SAIDI minutes.

### **Recent Call Volume Zone**

This zone shows a graph of the recent hourly call volume.

## **Current Outages By Operating Region Portal**

The Current Outage by Operating Portal provides the following zones:

- **Call List Zone**
- **Completed Event List Zone**
- **Customer List Zone**
- **Customer Summary Zone**
- **Event List Zone**
- **Event Summary Zone**
- **Outage Summary Zone**

### **Call List Zone**

This zone shows a list of all callers, phone numbers, and call dates/times for a selected event.

## **Completed Event List Zone**

This zone shows a list of completed events, including:

- event number
- event state
- control zone branch
- substation
- feeder
- duration
- number of customers affected
- outage device

## **Customer List Zone**

This zone displays a list of customers affected for a selected event.

## **Customer Summary Zone**

This zone displays a pie chart of current events by control zone branch (the third highest grouping in the control zone hierarchy).

## **Event List Zone**

This zone shows a list of current events, including:

- event number
- event state
- control zone branch
- substation
- feeder
- number of customers affected
- duration
- outage device

## **Event Summary Zone**

This zone displays a pie chart of current customers out by control zone branch (the third highest grouping in the control zone hierarchy).

## **Outage Summary Zone**

This zone displays a list of outage summaries by control zone, including:

- control zone company
- control zone region
- control zone branch
- number of current customers interrupted
- number of current events
- number of current calls

## Customer Restoration Portal

The Customer Restoration Portal provides the following zones:

- **Estimated Restoration Zone**
- **Historical Call List Zone**
- **Historical Customer List Zone**
- **Historical Event List Zone**
- **Storm Progress and Estimated Restoration Zone**
- **Summation of Customers Restored and Still Out Zone**

### Estimated Restoration Zone

This zone shows a graph of hourly estimated restoration performance.

### Historical Call List Zone

This zone shows a list of calls for a selected event.

### Historical Customer List Zone

This zone shows a list of customers affected by a selected event.

### Historical Event List Zone

This zone shows a list of events for a selected calendar month, including:

- event state
- control zone branch
- substation
- feeder
- outage device type
- event number
- duration
- number of affected customers
- CMI
- user-defined fields

### Storm Progress and Estimated Restoration Zone

This zone displays an hourly graph of total customers out and interrupted.

### Summation of Customers Restored and Still Out Zone

This zone shows an hourly graph of customers restored vs. customers still out.

## Outage Analysis Portal

The Outage Analysis Portal provides the following zones:

- **Average Device Restoration Zone**
- **CMI Summary by Outage Cause**
- **Customers by Device Type**
- **Customers out over 8 hours Zone**
- **Outages by Device Type Zone**

### Average Device Restoration Zone

This zone shows a pie chart of average restoration times by outage device type.

### CMI Summary by Outage Cause

This zone shows a pie chart of CMI by outage cause.

### Customers by Device Type

This zone shows a pie chart of customers out by outage device type.

### Customers out over 8 hours Zone

This zone shows a graph of customer outage durations by hour.

### Outages by Device Type Zone

This zone is a pie chart of the number of outages by device type.

## Outages By Political Boundary Portal

The Outage by Political Boundary Portal provides the following zones:

- **City Estimated Restoration Performance Zone**
- **Current City Outage Summary**

### City Estimated Restoration Performance Zone

This zone displays a graph of hourly outage restoration performance by city.

### Current City Outage Summary

This zone shows a pie chart of current outages by city.

## Feeder Performance Portal

The Feeder Performance Portal provides the following zones:

- **Feeder Performance Zone**
- **Worst Performing Feeder Pie Chart Zone**
- **Worst Performing Feeder Pie Chart Zone**

### Feeder Performance Zone

This zone lists each feeder, including:

- SAIDI
- Company



- Region
- Branch
- Substation
- feeder name

### **Worst Performing Feeder Pie Chart Zone**

This zone displays a pie chart of the worst performing feeders.

### **Worst Performing Feeders Zone**

This zone lists the 10 worst performing feeders, including:

- feeder name
- SAIDI minutes
- percentage of the total SAIDI minutes
- rank

## **Sustained Reliability Limits Portal**

The Sustained Reliability Portal provides the following zones:

- **ASAI Zone**
- **Accumulating SAIDI Minutes Zone**
- **Accumulating SAIFI Outages Zone**
- **CAIDI Zone**
- **SAIDI Zone**
- **SAIFI Zone**

### **ASAI Zone**

This zone displays a green/yellow/red stoplight indicator with the ASAI calculation and the CMI for the month.

### **Accumulating SAIDI Minutes Zone**

This zone displays a graph of the SAIDI, SAIDI limit, YTD SAIDI, and YTD SAIDI limit by month.

### **Accumulating SAIFI Outages Zone**

This zone displays a graph of the SAIFI, SAIFI limit, YTD SAIFI and YTD SAIFI limit by month.

### **CAIDI Zone**

This zone displays a graph of the CAIDI by month.

### **SAIDI Zone**

This zone displays a green/yellow/red stoplight, along with the SAIDI minutes and SAIDI limit for the year.

**SAIDI** stands for system average interruption duration index. This index is commonly referred to as Customer Minutes of Interruption or Customer Hours, and is designed to provide information about the average time the customers are interrupted.

In words, the definition is:

$$\text{SAIDI} = \frac{\sum \text{Customer Interruption Durations}}{\text{Total Number of Customers Served}} \quad (\text{A BIC } 3)$$

To calculate the index, use the following equation:

$$\text{SAIDI} = \frac{\sum r_i N_i}{N_T} \quad (\text{A BIC } 4)$$

### SAIFI Zone

This zone displays a green/yellow/red stoplight, along with the SAIFI outages and SAIFI limit for the year.

**SAIFI** stands for system average interruption frequency index (sustained interruptions). The system average interruption frequency index is designed to give information about the average frequency of sustained interruptions per customer over a predefined area. In words, the definition is:

$$\text{SAIFI} = \frac{\text{Total Number of Customer Interruptions}}{\text{Total Number of Customers Served}}$$

The index is calculated using following equation:

$$\text{SAIFI} = \frac{\sum N_i}{N_T}$$

## Monthly Reliability Limit Portal

The Monthly Reliability Portal provides the following zones:

- **Monthly ASAI Zone**
- **Monthly CAIDI Zone**
- **Monthly SAIDI Zone**
- **Monthly SAIFI Zone**

### Monthly ASAI Zone

This zone displays a green/yellow/red stoplight, along with the ASAI and ASAI limit for the month.

### Monthly CAIDI Zone

This zone displays a green/yellow/red stoplight, along with the CAIDI and CAIDI limit for the month.

### Monthly SAIDI Zone

This zone displays a green/yellow/red stoplight, along with the SAIDI and SAIDI limit for the month.

## Monthly SAIFI Zone

This zone displays a green/yellow/red stoplight, along with the SAIFI outages and SAIFI limit for the month.

## Current Feeder Lockouts Portal

The Current Feeder Lockouts Portal provides the following zones:

- **Current Feeder Lockout by Region Zone**
- **Current Feeder Lockout by Region Pie Chart Zone**

### Current Feeder Lockout by Region Zone

This zone displays a list of feeder lockouts, including:

- company
- region
- branch, substation
- feeder name
- event state
- duration
- user-defined measure
- begin date/time

### Current Feeder Lockout by Region Pie Chart Zone

This zone displays a pie chart of the number of feeder lockouts by region.

## Momentary Reliability Limit Portal

This portal provides the following zones:

- **MAIFI Zone**
- **MAIFIE Zone**

### MAIFI Zone

This zone shows a graph of the MAIFI by month.

### MAIFIE Zone

This zone shows a graph of the MAIFIE by month.

## Wire Down Event Portal

The Wire Down Event Portal provides the following zones:

- Active Wire Down Call List Zone
- Current Events with Wires Down Calls List Zone
- Events with Wire Down Calls Zone

### Active Wire Down Call List Zone

This zone shows the wire down calls for a selected event.

### **Current Events with Wires Down Calls List Zone**

This zone shows a list of current events with wires down, including:

- event state
- branch
- substation
- feeder
- device type
- event number
- duration
- number of customers
- CMI
- user-defined field

### **Events with Wire Down Calls Zone**

This zone displays a graph of events with wire down calls by hour.

## **Feeder Delivered Load Portal**

The Feeder Delivered Load Portal provides the following zones.

- Smallest Feeder Capacity Margin
- Greatest Feeder Peak Delivered Load
- Feeder Load Detail
- Feeder Delivered Load

### **Smallest Feeder Capacity Margin Zone**

When you expand the Smallest Feeder Capacity Margin zone, the following columns are displayed:

- Calculated Capacity Margin
- Feeder Name
- 3 Phase Amp (maximum 3 Phase AMPERE load)
- Breaker Limit

### **Greatest Feeder Peak Delivered Load Zone**

This zone displays the top 20 Feeders with corresponding Peak Load KVA.

### **Feeder Load Detail Zone**

When you expand the Feeder Load Detail zone., the maximum values for KVA, KW, KVAR, AMP, Feeder Voltage are displayed.

### **Feeder Delivered Load Zone**

When you expand the Feeder Delivered Load zone, the average KVA, KW, KVAR, and AMP for each hour are plotted in the zone.

## Historical Storms Portal

The Historical Storms Portal provides the following zones:

- Historical Storms Summary
- Historical Storm – Outages By Type
- Historical Storm – Outages By Operating Region
- Storm Outages List

### Historical Storms Summary Zone

This zone displays the list of historical storms. Other zones in this portal display information for the storm selected in this zone. Following columns are displayed:

- Storm Name
- Start Date
- End Date
- Storm Type
- Storm Level
- # of Outages

### Historical Storm – Outages by Operating Region

This zone displays a count of outages that are part of the selected storm, sliced by geographic region.

### Historical Storm - Outages By Type

This zone displays a count of outages that are part of the selected storm, sliced by outage type.

### Storm Outages List

This zone displays a list of outages that are part of the selected storm. Following columns are displayed:

- Event Number
- Branch
- Substation
- Feeder
- Start Date
- Est. Restore Date
- Est. Restore Time
- Actual Restore Date
- Actual Restore Time



# Chapter 8

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## SCADA Extensions

This chapter covers **Oracle Utilities Network Management System (NMS) – SCADA Extensions**, including the following topics:

- **Overview**
- **SCADA Measurements**
- **Using SCADA Features**
- **Using the SCADA Summary**
- **Understanding SCADA Information in the Viewer**
- **Using SCADA Control Tool Features**
- **Switching Management SCADA Integration**

### Overview

SCADA Extensions offers extended functions that enhance the capabilities of the Work Agenda, Viewer, Control Tool, and Web Switching Management applications. It also provides SCADA Summary, a window to display information about mapped SCADA measurements. These extended functions incorporate real-time data from a Supervisory Control and Data Acquisition (SCADA) system.

SCADA Extensions is required in order to display any SCADA data in **NMS**, whether it is through the Oracle Utilities Network Management System – SCADA ICCP Block 1, 2, and 5 Adapter interface or a custom interface. The interface itself is a separate component from the **NMS** and **SCADA Extensions**.

There are two basic types of SCADA interfaces employed. A one-way interface provides **NMS** with real time values for SCADA digital and analog measurements as well as quality codes, tags, and alarms. A two-way interface also allows the remote control of SCADA devices from within **NMS**.

### SCADA Measurements

There are three possible types of SCADA measurements that SCADA Extensions can display:

- **Analog** - Numeric measurements of the distribution system operating conditions at SCADA devices, such as amps, kVAr, and volts.
- **Status** - Binary values, such as OPEN/CLOSE and ON/OFF. Status values related to switches are mapped into the topological status of switchable devices that affect the energization of the distribution model. Other status values, such as reclose, enabled, loop scheme indication, lightning mode, and fault indicators, are displayed as text pairs of symbols.

- **Digital** - Whole-integer value measurements indicating the state of the device such as tap positions or counters. The **NMS** SCADA ICCP Block 1, 2, and 5 Adapter does not currently support digital whole-integer measurements. However, these values can be available if converted through a custom adapter into engineering values.

### Quality Codes

Quality codes provide information about the quality of the measurement coming from the SCADA system. Examples may include held, suspect, not valid, telemetered, calculated, entered, estimated, abnormal, “off scan”, “SCADA error”, and “tag on”. Additionally there are quality codes that may be applied to a SCADA measurement from the **NMS** applications. These include alarm inhibited and manually overridden.

Quality codes that may be configured to be supplied by the Oracle Utilities Network Management System SCADA ICCP Block 1, 2, and 5 Adapter include held, suspect, not valid, telemetered, calculated, entered, estimated, and abnormal.

## Using SCADA Features

There are six primary locations where SCADA information can be accessed in **NMS**:

- SCADA device operations that result in customers out appear as real outage events on the trouble related views of the Work Agenda in the same manner as outages that were generated by call information except that they are automatically confirmed and appear immediately as real outages. These operations are also included on the Device Operations List on the Work Agenda.
- The SCADA Summary provides the current values and qualities of all mapped SCADA measurements in **NMS**, including both analog and digital measurements. You can filter, sort, modify, and comment on the measurements in the SCADA Summary.
- The Viewer displays dynamically updated SCADA information at or near the corresponding device on the electrical map. The data may be displayed via text annotation or, in the case of status and digital values, symbol changes. SCADA information that may be displayed on the Viewer includes switch status and other status values, digital values, and analog values, all with quality codes.
- The Web Workspace Viewer also shows all SCADA analog and digital values in the balloon dialog.
- The SCADA Alarms list is an extension of the Work Agenda window and may display various alarm messages that are sent from the SCADA system. You can modify, acknowledge, and comment on measurements on the SCADA Alarms list.
- Any SCADA status values that result in a switch being in its off-nominal state will cause the device to appear in the Abnormal Device Summary.
- Systems with a two-way interface let you perform remote operations (*e.g.*, open/close and tagging) on SCADA devices through an enhanced version of the Control Tool.

## Using the SCADA Summary

The SCADA Summary provides the current values and qualities of all mapped SCADA measurements in **NMS**. Each row of this summary represents one measurement. There may be multiple unique measurements on one SCADA device. SCADA information includes digital and analog measurement values, along with the quality codes and any user comments for each measurement. You can use the summary to view measurement information, manually replace current SCADA values, and inhibit updates.

For information about using the SCADA Summary in the Web Workspace, see **SCADA Summary** on page 1-83.



# Understanding SCADA Information in the Viewer

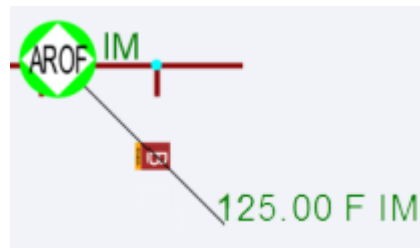
Oracle Utilities Network Management System SCADA Extensions provides SCADA information in the Viewer in several different ways. The following table describes how SCADA information may appear in the Viewer (depending on your system's configuration).

Data	Description
Switch Status	Switch status information ( <i>i.e.</i> , open or closed) received from SCADA is dynamically updated in the Viewer. Status symbology is no different than that for typical devices, except that it is based on data received automatically from a SCADA measurement rather than user input.
Digital Measurements	<p>Digital measurements (<i>e.g.</i>, tap position, auto reclose suppression, ground fault) received from SCADA are dynamically updated. These measurements are displayed as a letter code or symbol next to the SCADA device. Several digital measurement indicators may be listed.</p> <p>For example, when a SCADA Breaker's Auto Recloser attribute is set to off, the Viewer displays the AROF symbol</p>
Analog Measurements	Analog measurements received from SCADA are dynamically updated. These measurements are displayed in the Viewer next to the associated SCADA device. Several unique measurements can be listed. When a new measurement is received, it replaces the current measurement.
Quality Codes	<p>Quality codes provide additional information about the quality of the measurement coming from the SCADA device (<i>e.g.</i>, out of scan, inhibited, manual override). A quality code is displayed as a letter code following a symbol or measurement.</p>

## Quality Code Values:

- I: inhibited
- M: manually entered/overridden value
- H: high limit violation
- L: low limit violation

Example, SCADA Breaker with IM indicators on the manually entered values for Auto Recloser attribute (off) and temperature (125.00 F).



## Enabling/Disabling SCADA Measurements in the Viewer

You can enable or disable SCADA measurements in the Viewer using the Hide / Display dialog.

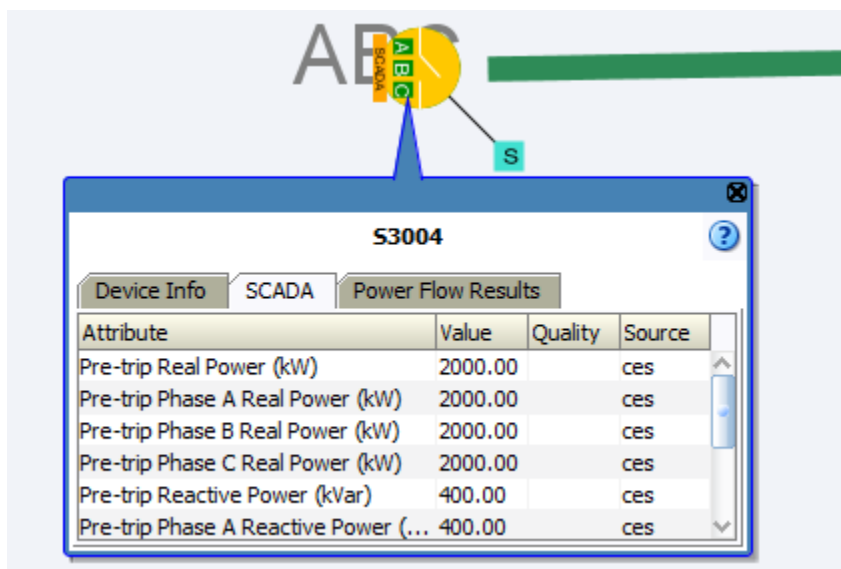
**Note:** to access the Hide/Display dialog in the Web Workspace Viewer, see **Hiding and Displaying Viewer Objects** on page 1-47.

The system displays a flag (S) to indicate that a device has available SCADA measurements.



### SCADA Device Details

If you select a SCADA device in the Viewer, the Device Details balloon displays a SCADA tab that lists the SCADA measurements for the selected device:



**SCADA Device Details** (see also **Displaying Device Details** on page 1-34)

- The **Attribute** column contains a description of the measurement type, as configured in the ATTRIBUTES.description column in the Oracle Utilities Network Management System database for the matching attribute.
- The **Value** column contains the last reported measurement value. The value can be status, digital, or analog. For status measurements, the values are displayed as a test pair, such as open/close, on/off, etc. Analog and digital values are shown as floating point and integer values.
- The **Quality** column contains the Quality codes for the measurement that indicates the quality of the SCADA measurement (e.g., out of scan, inhibited, manual override). Several quality codes can be listed.
- The **Source** column contains the source for the measurement, as configured in the ANALOG\_MEASUREMENTS.source or DIGITAL\_MEASUREMENTS.source column in the Oracle Utilities Network Management System database.

## Remote SCADA Operation Warnings

When you perform a remote SCADA device operation in a two-way system, Oracle Utilities Network Management System SCADA Extensions will run certain checks. There are three warnings that you might receive as a result of these checks.

**Note:** The Oracle Utilities Network Management System SCADA ICCP Block 1, 2, and 5 Adapter controls are limited to switch status direct operate request.

The following table describes the possible remote SCADA operations warnings.

Warning	Description
SCADA Confirmation	When you open or close a SCADA-controlled device, the Look Ahead window opens providing information about the potential results of the operation (see <b>Using the Look Ahead Window</b> on page 1-70). After you view all the required information and choose to proceed, another message box opens, reminding you that a remote operation will take place and asking you to confirm the SCADA-controlled operation.
SCADA Control Action Time-Out	Once you have confirmed that you want to perform a SCADA-controlled device operation, Oracle Utilities Network Management System SCADA Extensions starts a timer. This timer monitors the response to the operation, expecting a “change-of-state” of the device ( <i>e.g.</i> , open to close). If a change-of-state is not detected from the device before a time-out occurs, Oracle Utilities Network Management System SCADA Extensions generates an alarm displayed in the SCADA Alarms List.
SCADA Error	If errors are detected between Oracle Utilities Network Management System and the SCADA interface, a message box opens informing you of the failed operation. You should report these errors to the system administrator or support personnel.

**Note:** If you click **Cancel** in the Look Ahead window, Oracle Utilities Network Management System SCADA Extensions will not initiate the remote SCADA operation.

## Using SCADA Control Tool Features

If your system has a one-way SCADA interface, you can only receive information about SCADA measurements. If it has a two-way SCADA interface, however, not only can you receive information, but you can also remotely control SCADA devices. The Oracle Utilities Network Management System SCADA ICCP Block 1, 2, and 5 Adapter remote control is limited to direct operate request of switch status.

Use the Control Tool to perform operations on SCADA devices in the exact same manner as you would on non-SCADA devices (see **Operating Devices** on page 1-60). However, the buttons on the Control Tool for opening and closing SCADA devices will read **Open SCADA** and **Close SCADA** (instead of simply **Open** and **Close**).

## Switching Management SCADA Integration

If you have a two-way SCADA system, you can operate devices as a step when completing a switching plan. Just like a typical switching plan, you can open or close devices by selecting the switching step and clicking the **Complete** button. (See **Issuing a Switching Sheet** on page 9-39.) With a two-way SCADA system, however, the actual device will be remotely operated. The Oracle Utilities Network Management System SCADA ICCP Block 1, 2, and 5 Adapter controls are limited to switch status.

If any errors occur, Oracle Utilities Network Management System SCADA Extensions generates an alarm displayed in the SCADA Alarms List.

# Chapter 9

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## Web Switching Management

This chapter describes the **Oracle Utilities Network Management System (NMS) Web Switching Management** application. It includes the following topics:

- **Overview**
- **Starting Web Switching Management**
- **Understanding Web Switching Management Windows**
- **Planned Switching**
- **Emergency Switching**
- **Event Associations**
- **Working with Safety Documents**
- **Outage Correction**
- **Using the Miscellaneous Log**
- **Viewing Global Overlaps**

### Overview

**Web Switching Management** allows you to create and implement *switching sheets* and *safety documents*. Switching Sheets allow you to track proposed switching actions, analyze the results, and implement the plan. Safety Documents provide an electronic representation of paper safety documents, which are used for switching operations to record the issuance and release of tags on devices.

**Web Switching Management's** full feature set is available through the **Web Workspace with Web Switching** environment. **Web Switching Request** provides a subset of the **Web Switching Management** tools related to creating and editing switching requests.

### Operating Modes

**Web Switching Management** supports two operating modes:

- **Real-Time Mode** - Allows you to make real-time changes to the state of devices in the system. When you create an emergency switching sheet, the system automatically enables real-time mode. For planned sheets, you can switch to this mode when the sheet is ready to be worked.
- **Study Mode** - Allows you to make changes without affecting real-time data. You can apply the actions to the steps, but the actions are not applied to the real-time data. This mode is

valid for all types of sheets. Study mode is the only valid mode for template and outage correction switching sheets.

## Starting Web Switching Management

### Logging in

To log in to **Web Workspace with Web Switching Management** or **Web Switching Request**, follow these steps:

1. Depending on how your system was installed, do one of the following:
  - Click the icon found under the appropriate program group in your Windows Start Menu.
  - Double-click the icon on your desktop.
  - Open a web browser and enter the URL in the browser's Address field.

The **Oracle Utilities Network Management System Web Switching Management** Login window displays.

2. Enter your user ID.
3. Enter the password.
4. Click the **Validate** button. The bottom portion of the Web Switching Login window sensitizes.
5. For **Web Workspace with Web Switching Management**, select the appropriate User Type from the drop-down menu (typically *Full Operations*). For **Web Switching Request**, the only User Type option is Switching Entry.
6. Click the **Login** button.

Once you have successfully logged on, the environment will open. Both are variations of the Web Workspace environment; see **Getting Started with Web Workspace** on page 1-1 for details.

- The **Web Workspace with Web Switching Management** environment opens with the Work Agenda, the Authority tool, and Crew Actions visible. (See **Understanding the Web Workspace Window** on page 1-3 for details.
- For **Web Switching Request** the window opens without any visible tools.

## Understanding Web Switching Management Windows

### Overview

This section provides an overview of Switching Sheet windows. Unlike other docked **NMS** applications, such as Work Agenda or the Authority tool, switching sheets cannot be moved outside of the confines of the **NMS** workspace. The standard configuration opens a switching sheet in the lower right quadrant of the workspace, but it may be moved anywhere within the workspace or maximized to the full workspace dimensions.

Each open switching sheet has its own tabbed window, which is labeled with a combination of the switching sheet type, number, and feeder ID, if the feeder field is populated. Multiple switching sheets are typically docked together and displayed as a tab group. Double-click any tab (or the

empty area to the right of the tabs) to maximize the tab group; double-click again to restore the size.

Right-click the switching sheet tabs to access the options menu, which provides the following options:

- **Maximize:** maximizes the sheet window.
- **Restore:** restores the maximized window to its original size and position.
- **New Tab Group:** displays the sheet separately.
- **Collapse Tab Groups:** regroups separate windows into tab groups.
- **Windows...:** opens a dialog that lists all open sheets, which you can then:
  - Activate (*i.e.*, bring to front in a tab group) a single sheet.
  - Close selected sheets.
- **Close (Ctrl-F4):** closes the sheet.
- **Close All (Ctrl+Shift-F4):** closes all open sheets.
- **Close Others:** closes all open sheets except the sheet that was right-clicked.

## Web Switching Sheets

### Switching Sheet Types

Web Switching Management supports the following types of switching sheets.

- **Planned** - Used for switching sequences that are prepared ahead of time. In scheduled or planned switching, you can create, study, and approve switching steps in a Viewer in study mode prior to completing them in real-time. Planned switching sheets require information that is not needed for emergency switching sheets, such as a start and end date.

**Note:** when creating a switching sheet from an event in the Work Agenda or Event Details, the *Planned* switching sheet type is not available.

- **Emergency** - Used for switching sequences that are prepared and implemented in real-time when overloads or unplanned outages occur.

**Notes:**

- Emergency Switching Sheets cannot be created from Web Switching Request.
- FLISR sheet types are created by the FLISR tool and are another form of an Emergency switching sheet. Users cannot create FLISR switching sheets from scratch. In automatic mode, FLISR can create and execute a switch plan without operator intervention. See **Executing FLISR in Automatic Mode** on page 12-6. In manual mode, you generate and then execute the switch plan manually. See **Generating a Switch Plan with FLISR in Manual Mode** on page 12-7.
- **Template** - Used to record and store frequently performed switching step sequences that can be copied into a switching plan. A template is not used to perform actions, but rather to create and save “pre-built” step sequences. You can create a template from scratch or by copying an existing planned or emergency switching sheet.

**Note:** when creating a switching sheet from an event in the Work Agenda or Event Details, the *Template* switching sheet type is not available.

- **Outage Correction** - Used to correct outage information. Outage events are associated to this switching sheet type and then steps are recorded to reflect the actual events leading up to the outage. An option on the sheet then allows you to update the associated event, including customer counts associated to the outage.

**Note:** Outage Correction switching sheets cannot be created from Web Switching Request.

Additional or alternative sheet types can be configured for your project; see the *Oracle Utilities Network Management System Configuration Guide* for details on creating custom sheet types.

## Switching Sheet States

A switching sheet passes through different phases during the creation and completion of the sheet. These phases are represented by “states” that follow a logical sequence and determine what you can do with a switching sheet at any time. Each sheet type has a unique set of state transitions. For example, planned switching sheets have more state transitions than emergency sheets.

Normal Progression of Planned Sheet	Normal Progression of Emergency Sheet
<ol style="list-style-type: none"> <li>1. New</li> <li>2. Requested</li> <li>3. Prepared</li> <li>4. Checked</li> <li>5. Approved (optional)</li> <li>6. Scheduled</li> <li>7. Issued</li> <li>8. In Progress</li> <li>9. Completed</li> </ol>	<ol style="list-style-type: none"> <li>1. New</li> <li>2. In Progress</li> <li>3. Completed</li> </ol>

See **Changing the Switching Sheet State** on page 9-16 for a complete description of each possible state and instructions for changing the sheet state.

**Note:** The state of the switching sheet should not be confused with the state of individual switching steps within the switching plan, which may also progress through a series of states. See **Switching Sheet Step States** on page 9-27.


## Switching Sheet Window Components

- **Menu and Toolbar Features**
- **Switching Sheet Tabs**
- **Status Bar**




### Menu and Toolbar Features

#### File Menu

The table below describes the options available on the File menu.

Menu Option	Description	Toolbar Icon
Save Sheet (Ctrl-S)	Saves the switching sheet.	
Copy As...	Opens the Copy Switching Sheet As dialog that allows you to copy the current sheet into a newly created sheet. The new sheet can be one of the following types: Planned, Emergency, Template, or Outage Correction. See <b>Copying a Switching Sheet</b> on page 9-57 for details.	--



Menu Option	Description	Toolbar Icon
Print Preview... (Ctrl-Shift-P)	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for previewing a switching report.	
Print (Ctrl-P)	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for printing a switching report.	
Email...	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for emailing a switching report.	
Exit	Closes the active switching sheet.	--

### Help Menu.

Option	Description	Toolbar Button
Web Switching Management Help [F1]	Opens online help content for the switching sheet's active tab. For example, if the Request tab is active, the "Completing the Request Tab" will be returned.	--
About Web Switching Management	Opens a window with environment and software information.	--

### Switching Sheet Tabs

Each switching sheet tab displays a row of tabs that you can use to view and edit all of the information associated with the sheet. Some tabs, like the Steps tab, have their own toolbar with shortcuts for supported actions.

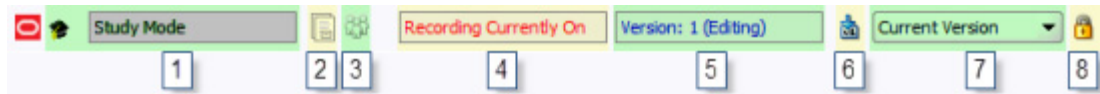
The following table describes the tabs displayed for each switching sheet.

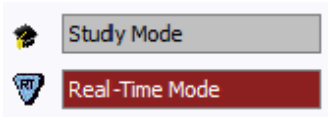
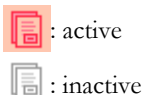
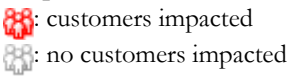
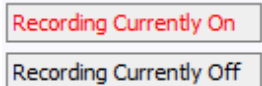
Tab	Description
Request	Use this to view and enter information about the user who requested the switching sheet, including phone number and contact, the sheet's owner, charge number, start and finish dates, feeder and voltage information. See <b>Completing the Request Tab</b> on page 9-13.
Steps	Use this to view, add, and edit switching steps. See <b>Adding and Editing Steps</b> on page 9-19.
Impacted Customers	Use this to view, print, and maintain the list of impacted customers. See <b>Viewing Impacted Customers</b> on page 9-45.
Overlaps	Use this view to identify overlaps that the sheet may have with other sheets in the system. The search criteria can include date/time, control zone, and affected devices. See <b>Checking for Overlaps</b> on page 9-48.





Tab	Description
External Documents	Use this to attach external documents to the switching sheet. See <b>Adding External Documents to a Switching Sheet</b> on page 9-54.
View Areas	Use this to save and reload viewing areas from a Viewer window. See <b>Saving and Loading View Areas</b> on page 9-50.
Safety Documents	Use this to view, load, and delete safety documents that have been defined for this sheet. See <b>Working with Safety Documents</b> on page 9-63.
Tracking/Audit Log	Use this to view audit log entries associated with this sheet. See <b>Viewing the Audit Log</b> on page 9-52. You can also use this to view the current sheet state or transition to another state. See <b>Changing the Switching Sheet State</b> on page 9-16.

## Status Bar

The switching sheet status bar provides several indicators about the switching sheet and related system status.



Status Bar Indicator	Description
<p>1 <b>Mode Indicator</b></p> 	<p>Indicates the current operating mode:</p> <ul style="list-style-type: none"> <li><b>Study Mode</b> - Allows you to complete switching operations without affecting the real-time data model. You can apply the actions to the steps, but the actions are not applied to the real-time data.</li> <li><b>Real-Time Mode</b> - Allows you to apply real-time changes to the state of devices in the data model.</li> </ul>
<p>2 <b>Overlap Indicator</b></p> 	<p>Indicates whether the switching sheet will result in overlap of affected devices or control zones during the same time period. This icon is dynamically updated to when overlaps are created or resolved.</p>
<p>3 <b>Impacted Customer Indicator</b></p> 	<p>Indicates whether or not switching operations will impact customers. This icon is dynamically updated to reflect the results of generating the impacted customer list.</p>
<p>4 <b>Recording Indicator</b></p> 	<p>Indicates whether recording is turned on or off. When recording is on, you can add steps by taking actions in the Viewer and Control Tool.</p>

Status Bar Indicator	Description
5 <b>Version Indicator</b> (Text)	Indicates the switching sheet version and whether or not your latest changes have been checked in. See <b>Working with Switching Sheet Versions</b> on page 9-43 for more information.
6 <b>Check In / Create New Version Button</b> 	The <b>Check In</b> button allows you to check in and save a copy of the switching sheet. This is used for auditing purposes to determine differences between steps in two versions of a switching sheet. When you check in a sheet, this button changes to Create New Version, which manually increments the sheet's version number and sets the sheet to Editing mode. See <b>Working with Switching Sheet Versions</b> on page 9-43 for more information.
7 <b>Version Menu</b> 	Indicates the version currently displayed and allows you to select a previous version to compare against the current version. See <b>Working with Switching Sheet Versions</b> on page 9-43 for more information.
8 <b>Lock/Unlock Indicator</b>  : locked  : unlocked	<b>Locking and Unlocking a Switching Sheet</b> Allows you to lock the switching sheet so that no other user can make changes to it. When the sheet is locked, you are the only user who can edit it. When it is unlocked, you are in view-only mode and the sheet is available for editing by other users. This button toggles the sheet between its locked and unlocked states. When you open a sheet for editing, the sheet is automatically locked to other users. If you open a sheet that is currently being editing by another user, you are not allowed to make any changes.

## Planned Switching


The sections that follow describe how to create and manage planned switching sheets. Planned switching sheets are used for switching sequences that are prepared ahead of time. In scheduled or planned switching, you can create, study, and approve switching steps in a Viewer in study mode prior to completing them in real-time mode.

This section contains the following topics:

- **Creating a Planned Switching Sheet**
- **Opening an Existing Switching Sheet**
- **Switching Sheet Requests**
- **Changing the Switching Sheet State**
- **Adding and Editing Steps**
- **Reviewing a Switching Sheet in Study Mode**
- **Replaying Steps**
- **Implementing a Planned Switching Sheet**
  - **Scheduling a Planned Master Event**
  - **Issuing a Switching Sheet** (includes associating a crew and printing the sheet)
  - **Instructing and Completing Switching Sheet Steps**
  - **Moving a Crew**
- **Working with Switching Sheet Versions**
- **Viewing Impacted Customers**
- **Checking for Overlaps**
- **Saving and Loading View Areas**
- **Emailing Switching Sheet Data**
- **Adding External Documents to a Switching Sheet**
- **Viewing the Audit Log**

For information about emergency switching sheets, see **Emergency Switching** on page 9-59.

## Creating a Planned Switching Sheet

You can create a new planned switching sheet directly from the Web Workspace with Web Switching Management File menu's **New>Switching Sheet...** option or the  toolbar button. The New Switching Sheet window is displayed.

### New Switching Sheet Window

Use the New Switching Sheet window to create switching sheets. This window contains the following fields and buttons:

- The **Type** column displays the types of switching sheets you can create. Planned, Emergency, and Template are the base types.
- The **Description** column displays a description of the sheet type.

The **Pre-Created Switching Sheets** section displays a list of all existing switching sheets. It displays the following columns:

- **Status** displays the switching sheet state, such as New or Requested.

- **Type** displays the sheet type, such as Planned, Emergency, or Template.
- **Sheet #** is the number of the switching sheet. This number is automatically assigned by the system when the sheet is created.
- **User** is the ID of the user who created the sheet.
- **Feeder** is the feeder associated with the sheet (as displayed on the Request tab).
- **Device** is the device associated with the sheet (as displayed on the Request tab).
- **Substation** is the substation associated with the sheet (as displayed on the Request tab).
- **Completed Date** is the completion date for the sheet.
- **Description** is the description of the sheet (as displayed on the Request tab).
- The **Create** button creates a new switching sheet of the selected type.
- The **Create a Copy** button creates a copy of the switching sheet selected in the **Pre-Created Switching Sheets** list. This button is not enabled unless a switching sheet and a sheet type are selected.

See Also:

- **Creating a Planned Switching Sheet**
- **Filtering the Switching Sheet List**
- **Sorting the Switching Sheet List**
- **Creating a Switching Sheet Template**
- **Creating a Switching Sheet from a Template**

## Creating a Planned Switching Sheet

Follow these steps to create a planned switching sheet from the New Switching Sheet window:

- To create a new switching sheet from scratch, select **Planned** from the Switching Sheet Types section, and then click **Create**.
- To create a copy of an existing sheet, do the following:
  1. Select the sheet you want to copy from the Pre-Created Switching Sheets list.
  2. Select **Planned** from the Switching Sheet Types list.
  3. Click **Create a Copy**. (To search for a particular sheet, see **Filtering the Switching Sheet List** on page 9-10.)

### Notes:



You can create a new sheet based on a sheet of a different type. For example, you can create a planned sheet based on an emergency sheet or create a template based on a planned sheet.

Although most fields are copied to the new sheet, some fields (such as Audit Log entries and step completion information) are cleared in the new sheet. If you copy a switching sheet that has one or more safety documents, copies of the safety documents are included with the new sheet.

## Filtering the Switching Sheet List

Use the edit boxes at the top of each column to filter the list. Type all or part of the text you want to filter by. For example, to see only Planned sheets, type “Plan” in the Type edit box. The list is filtered to display only sheets where the Type column contains the characters “Plan.” You can combine filter criteria by typing values in more than one column. As you type in each edit box, the list is filtered immediately based on entries in all boxes.

## Sorting the Switching Sheet List

You can sort the list by clicking on a column header. A  or  icon indicates the column is being sorted in ascending or descending order, respectively.

## Creating a Switching Sheet Template

Switching templates look like standard switching sheets, but they are used for creating and saving sheets that contain common information that is used repeatedly. The information may include:

- File attachments, which may be templates of other forms such as Excel Spreadsheets.
- Safety Documents
- View Areas.
- Pre-filled Request Tab Information.

Once you save the template, you can create a copy of it, and then edit the copy as needed. You can also copy individual steps from a template and paste them into another switching sheet. Templates can save you considerable time and effort when you are working with frequently performed switching sequences.

To create a template:

1. From the **File** menu, select **New>Switching Sheet...** The New Switching Sheet window is displayed.
2. From the Switching Sheet Types section at the top of the window, select **Template**.
3. Do one of the following:
  - To create a new, blank template, click **Create**.
  - To create a template based on an existing sheet, select the sheet you want to copy from the Pre-Created Switching Sheets list, and then click **Create a Copy**. To search for a particular sheet, see **Filtering the Switching Sheet List** on page 9-10.

**Note:** Although most fields are copied to the new sheet, some fields (such as Audit Log entries and step completion information) are cleared in the new sheet.

## Creating a Switching Sheet from a Template

After a switching template has been created and saved, you can use the template as the basis for another switching sheet.

To create a new planned sheet from a template:

1. From the **File** menu, select **New>Switching Sheet...** The New Switching Sheet window is displayed.
2. From the Switching Sheet Types section at the top of the window, select **Planned**.
3. From the Pre-Created Switching Sheets list, select the template to use.
4. Click **Create a Copy**.
5. Edit the sheet as needed (see the instructions in the remainder of this guide) and save when you are done.

## Opening an Existing Switching Sheet

Depending on how a switching sheet is being worked, there are a number of ways for you to load an existing switching sheet.

- **From Web Switching Management**
- **From Web Switching Request**
- **From the Work Agenda**
- **From the Event Details**
- **From Crew Actions**
- **From the Control Tool**

### From Web Switching Management

To open a switching sheet from the Web Switching Management window:

1. From Web Workspace with Web Switching Management File menu, select **Open>Switching Sheet...** The Open Switching Sheet window opens.
2. Select a sheet and click **Open**.

### From Web Switching Request

To open a switching sheet from the Web Switching Request window:

1. From the File menu, select **Open>Switching Sheet...** The Open Switching Sheet window opens.
2. Select a sheet and click **Open**.

### From the Work Agenda

1. Select an event from one of the Events Lists that has a switching sheet associated to it. This can be determined by checking to see whether a switching sheet number is displayed within the Plan # column for the selected event.
2. Select the **Switching...** option from the **Actions** menu. The Open or Create New Switching Sheet dialog is displayed.
3. Select the sheet you want to load from the Pre-Created Switching Sheets list and click **Open**. (You can start a new sheet by selecting a sheet type and clicking **Create**.)

### From the Event Details

1. Select **Switching...** from the Actions menu. The Open or Create New Switching Sheet dialog is displayed.
2. Select the sheet you want to load from the Pre-Created Switching Sheets list and click **Open**. (You can start a new sheet by selecting a sheet type and clicking **Create**.)

### From Crew Actions

1. If a crew has been placed en route to a Master switching sheet event, then select the crew in the crew list.
2. Select **Switching...** from the Actions menu. If only one sheet is associated with the crew, it is displayed in the Web Switching Management window. If multiple sheets are associated with the crew, the Crew to Sheet Selection List displays all associated sheets. If no sheets are associated with the crew, an error message appears.
3. Select a sheet and click **Open**.

### From the Control Tool

1. From a Viewer, double-click on a device that is involved in a switching sheet. The Control Tool is displayed.
2. Select the **Switching Plan(s)...** button.

If only one switching sheet step is actively open on the device, then that sheet is displayed in the Web Switching Management window. If the device is involved in multiple active switching sheet steps, then the Device to Sheet Operation List displays a list of operations. Each operation represents a step in a switching sheet.

**Note:** The Device to Sheet Operation List displays steps for active switching sheets and completed switching sheets for the last 30 days only.

3. Select an operation and click **Open**.

### Open Switching Sheet Window

Use the Open Switching Sheet window to open an existing switching sheet. This window displays when you select **Open>Switching Sheet...** option from the **File** menu.

All existing switching sheets are displayed and color-coded to reflect their status:

- **Green:** In Progress
- **Red:** New
- **Bright Yellow:** Scheduled, Checked, or Approved
- **Pale Yellow:** Prepared
- **Orange:** Requested
- **White:** Hold/Pending

You may select multiple sheets in the list to open by doing one of the following:

- Click, hold, and drag to select multiple adjacent rows.
- Control-click to select multiple non-adjacent rows.
- Use Dynamic Filtering to select sheets in the table and select all results by pressing Control+A.

This window also supports standard filtering and sorting. (See **Sorting** on page 1-11 and **Filtering** on page 1-12.)

Related Topics:

- **Opening an Existing Switching Sheet**
- **Working with Safety Documents**



## Switching Sheet Requests

Someone other than the person who prepares the switching sheet usually initiates switching sheet requests. The requestor may be someone in the construction/maintenance department, while the preparer is typically an operations user assigned to look for and prepare new requests. Typically, the requestor is a Switching Entry user type.

### Capabilities of the Switching Entry User Type

Switching Entry users do not have full access to all switching sheet information and operations. Specifically, Switching Entry users are limited to the following capabilities:

- Creating and viewing “Planned” switching sheets only. All other types of switching sheets are not available to Switching Entry users.
- Creating copies of existing switching sheets.
- Loading, printing, and emailing existing sheets. Only the information contained in the Request, Steps, Tracking/Audit Log, and External Documents tabs can be viewed, printed, or emailed.
- Performing the following operations on switching sheets that are in the New or Request Rejected state only:
  - Completing the fields on the Request tab.
  - Adding, removing, modifying, cutting, copying and pasting comment steps within the current sheet's Steps list. Note that cut, copy and paste operations are only supported for sheets that are in the New or Request Rejected states.
  - Adding, removing, and viewing attachments on the External Documents tab.
  - Adding comment entries to the audit log on the Tracking/Audit Log tab.
  - Incrementing and checking in versions of a switching sheet. This is done by selecting the Check-in button on the status bar of the switching sheet.

Once a sheet has transitioned to (or beyond) the Prepared state, Switching Entry users are limited to view-only mode.

### Completing the Request Tab






Follow the steps in the previous sections to start a new planned switching sheet. Then use the Request tab to enter basic information about the switching sheet before you begin adding steps. When a new sheet is created, the user ID of the person who created it is automatically displayed in the Requested By field. You should complete as much of the information on this tab as possible.

When you have completed the information on the Request tab (fields described below), update the sheet state to **Requested** on the Tracking/Audit Log tab. See **Changing the Switching Sheet State** on page 9-16 more information.

**Note:** The switching sheet is automatically saved after a state change, and an entry is added to the audit log.

The Request tab contains the following fields:


- **Owner** displays the current owner of the switching sheet. See **Taking Ownership** on page 9-15 for more information.
- **Requested By** displays the person who requested the switching order. This field is initially populated with the ID of the user who created the switching sheet and can be updated. A value is required prior to submitting the request.
- **Phone Number** displays the phone number of the person requesting the switching order.
- **Email Address** displays the email address of the requestor.

- **Customer Name** displays the name of the customer requesting the interruption.
- **Phone Number** displays the phone number of the customer requesting the interruption.
- **Email Address** displays the email address of the customer requesting the interruption.
- **Charge Number** allows you to enter charge numbers that can then be executed and/or used by the switching sheet preparer.
- **Office** displays the office responsible for the switching sheet.
- **Location** displays the street address or specific location for the switching operation.
- **Substation** displays the substation where the switching operation takes place.
- **Device** displays the device being worked on (not necessarily the device being switched). This device address is given to the master event associated to the switching sheet after the switching sheet has been scheduled. The following buttons are displayed to the right of the Device field:
  - Use the  **Device Lookup** button to search for and select a device.
  - Use the  **Link Device** button to link a device selected from the Viewer to this switching sheet. First, click on the device in the Viewer, then click this button. The Device field is populated with the selected device's name.
  - Once a device has been linked, you can use the  **Unlink Device** button to clear the device field.
  - Use the  **Focus** button to locate this device in the Viewer.
- **Description of Work** displays a general description about what the switching sheet should try to accomplish.
- **Start Date** displays the date and time the switching work is scheduled to begin. This is required when scheduling a switching sheet. This is the Start Date given to the master event associated to the switching sheet after it has been scheduled. This is also used to generate the Impacted Customers list if no Planned Date is specified for a step. Enter the time in military time format (*e.g.*, 13:00 = 1 P.M.).
- **Alt. Start Date** displays the alternate date and time the switching work could begin. Enter the time in military time format (*e.g.*, 13:00 = 1 P.M.). The alternate start date must be later than the start date.
- **Finish Date** displays the date and time the switching work is scheduled to end. This field is required when scheduling a switching sheet. This date is the Estimated Restore Time (ERT) given to the master event associated to the switching sheet after it has been scheduled. The finish date must be later than the start date, and you must enter the finish time for the date to be valid. Enter the time in military time format (*e.g.*, 13:00 = 1 P.M.).
  - Use the  **Update ERT** button to update the ERT for the master event associated to the switching sheet. This option is only available after the sheet has been scheduled. This button is displayed next to both the Finish Date and Alt. Finish Date fields. The button is grayed if no date has been entered yet for the field.
- **Alt. Finish Date** displays the alternate date and time the switching work could end. The alternate finish date must be later than the alternate start date. Enter the time in military time format (*e.g.*, 13:00 = 1 P.M.).
- **Feeder** displays the feeder that is relevant to the switching sheet. This is a text entry field and is not auto-populated.
- **Voltage** displays a drop-down menu that lists the nominal device voltages. This list is configured and is not dynamically generated.

- The **Crew Will Switch** checkbox allows you to indicate whether the requesting crew will perform the switching activities.
- The **Crew Will Restore** checkbox allows you to indicate whether the requesting crew will restore the outage associated with the switching activities.
- The **Grounds Required** checkbox allows you to indicate whether the crew is required to place grounds on the appropriate devices or not.

## Taking Ownership

You can take ownership of a switching sheet to indicate that you are currently working the sheet. Once you take ownership, no other user is allowed to execute steps for the sheet or edit restricted fields. Other users can still view, lock, and edit certain fields on the sheet.

To take ownership of a plan, click the  **Take Ownership** button next to the Owner field on the Request tab. Your user ID is displayed in the Owner field. You can also use this button to take over ownership of a switching sheet that is currently owned by another user. This is useful if there is a shift change and the original user does not relinquish ownership before logging off.

To relinquish ownership, click the  **Relinquish Ownership** button.

An entry is recorded in the audit log whenever ownership of a sheet changes.

## Changing the Switching Sheet State

A switching sheet passes through different phases during the creation and completion of the plan. These phases are represented by “states” that follow a logical sequence and determine what you can do with a switching sheet.

**Note:** The state of the switching sheet should not be confused with the status of individual switching steps within the switching sheet.

A switching sheet’s current state is displayed on the Tracking/Audit Log tab. This tab also displays a button for each valid state to which the sheet can transition and allows you to enter a comment associated with the state transition.

Sheet State Tracking

Current State

Requested

▶ Reject

Reason

▶ Prepared

Comment

▶ Delete

Reason

Audit Log

Entry Date	Sheet Version	Sheet State	Entry By	Details
03/27/12 10:00	1	New	nms11	Switching Sheet Creation.
03/27/12 10:10	1	New	nms11	Check in New Version of Switching Sheet.
03/27/12 14:30	2	New	nms11	Increment Version of Switching Sheet.
03/27/12 14:31	2	New	nms11	Check in New Version of Switching Sheet.
03/27/12 14:32	3	New	nms11	Increment Version of Switching Sheet.
03/27/12 15:15	3	New	nms11	Take ownership of Switching Sheet.
03/27/12 15:16	3	Requested	nms11	Switching Sheet State Change.

To change the state of a switching sheet, click the appropriate state change button on the Tracking/Audit Log tab. It is helpful to provide comments or a reason for the state change.

The Audit Log table on the Tracking/Audit Log tab shows a history of all state transitions for the sheet, including the ID of the user who updated the state and the timestamp of the change. See **Viewing the Audit Log** on page 9-52 for details.

## Switching Sheet States

The following table describes the switching sheet states.

State	Description
New	Indicates that the switching sheet is in the process of being created but has not yet been requested. When you create a switching sheet, its initial state is New.
Requested	Indicates that the sheet has been requested. A sheet transitions to this state when a user clicks the <b>Submit Request</b> button on the Tracking/Audit Log tab. This state is valid for planned switching sheets only. From this state, a sheet can progress to either the Rejected or Prepared state.
Rejected	Indicates that the request was rejected. A sheet transitions to this state when a user clicks the <b>Reject</b> button on the Tracking/Audit Log tab. The Reject button is grayed until you select a Reason. This state is valid for planned switching sheets only. From this state, a sheet can be requested again by clicking the <b>Submit Request</b> button on the Tracking/Audit Log tab.
Prepared	Indicates that the sheet has been prepared. A sheet transitions to this state when a user clicks the <b>Prepare</b> button on the Tracking/Audit Log tab. Although not required, all information for the switching sheet should be entered before you transition to this state. This state is valid for planned switching sheets only. From this state, a sheet can transition to the Checked state.
Checked	Indicates that the sheet has been checked. A sheet transitions to this state when a user clicks the <b>Check</b> button on the Tracking/Audit Log tab. All information for the switching sheet should be entered before you check the sheet. This state is valid for planned switching sheets only. From this state, a sheet can be approved, rejected, or scheduled.
Approved	Indicates that the sheet has been approved. A sheet transitions to this state when a user clicks the <b>Approve</b> button on the Tracking/Audit Log tab. All information for the switching sheet should be entered before you approve the sheet. This state is valid for planned switching sheets only. From this state, a sheet can be scheduled.
Check Rejected	Indicates that the sheet was rejected after being checked. A sheet transitions to this state when a user clicks the <b>Reject</b> button on the Tracking/Audit Log tab. The Reject button is grayed until you select a Reason. This state is valid for planned switching sheets only. From this state, the sheet can be prepared again.
Scheduled	Indicates that the sheet has been scheduled. A sheet transitions to this state when a user clicks the <b>Schedule</b> button on the Tracking/Audit Log tab. All information for the switching sheet should be entered prior to scheduling the sheet. This state is valid for planned switching sheets only. From this state, a sheet can be cancelled or issued.

State	Description
Canceled	Indicates that the sheet was cancelled. A sheet transitions to this state when a user clicks the <b>Cancel</b> button on the Tracking/Audit Log tab. The Cancel button is grayed until you select a Reason. This state is valid for planned switching sheets only. From this state, a sheet can be scheduled again.
Issued	Indicates that the sheet has been issued. A sheet transitions to this state when a user clicks the <b>Issue</b> button on the Tracking/Audit Log tab. All information for the switching sheet should be entered before issuing a sheet. This state is valid for planned switching sheets only. From this state, a sheet can transition to the Hold/Pending, In Progress (automatically), or Completed state.
In Progress	Indicates that at least one switching step in a planned or emergency switching sheet has been completed in real-time mode. This state is set automatically by the system and is valid for planned switching sheets only. From this state, a sheet can transition to the Hold/Pending or Complete state.
Hold/Pending	Indicates that the sheet is on hold. A sheet transitions to this state when a user clicks the <b>Hold/Pending</b> button on the Tracking/Audit Log tab. From this state, a sheet can progress to the In Progress (automatically) or Complete state.
Completed	Indicates that the sheet has been completed in real-time mode. A sheet transitions to this state when a user clicks the <b>Complete</b> button on the Tracking/Audit Log tab. A terminal action (Complete, Delete, Abort or Fail) must have been taken for each of the switching steps before a sheet can be completed. (See <b>Switching Sheet Step States</b> on page 9-27 for information about step states.) Once a plan is complete, it cannot be edited. This state applies to both planned and emergency switching sheets.
Deleted	Indicates that the sheet was deleted using the <b>Delete</b> button on the Tracking/Audit Log tab. The Delete button is grayed until you select a Reason.

## Adding and Editing Steps

This section describes how to add and edit steps in a switching sheet. It includes the following topics:

- **Steps Tab**
- **Switching Sheet Step States**
- **Adding Recorded Steps to a Switching Sheet**
- **Adding Comment Steps**
- **Copying and Pasting Steps**
- **Creating Go-Back Steps**
- **Working with Blocks**
- **Grouping and Ungrouping Steps**
- **Editing Existing Steps**
- **Finding and Replacing a Device in the Steps**
- **Finding and Replacing Text in the Steps**
- **Focusing on a Device in a Step**
- **Moving a Crew**

### Steps Tab

Use the Steps tab to add, edit, record, instruct, and execute steps in a switching sheet.

Steps tab topics include:

- **Steps Tab Fields**
- **Steps Tab Toolbar and Options Menus**
- **Steps Tab Events and Crews Pane**

### Steps Tab Fields

The steps table on the Steps tab displays the following fields:

- **Step#** displays the number of the step.
  - For a block header row, this column displays the block name.
  - For a step row, this column displays the step number (1 through n).
  - For a sub-step within an aggregate step, such as Open & Tag, this column displays the sub-step number (a-z). Blocks and aggregate steps can be expanded or collapsed by clicking the + or - sign.
  - If you are viewing the differences between this version and another version, this column uses outline numbering (1.1, 1.2, etc.) to identify steps that were added since the previous version. See **Working with Switching Sheet Versions** on page 9-43 for more information.
- **Version** displays the version number of the switching sheet when the step was added. See **Working with Switching Sheet Versions** on page 9-43 for more information.
- **Operation** displays the description of the switching action. When the switching action is associated to a safety document, then the safety document type and number will be displayed in this field after the switching description.
- **Device** displays the device alias referenced in the step.

- **Phases** displays the phase that was selected for the step. When obtaining a device through a Viewer device selection, all the phases are selected by default.
- **Details** displays information about the outcome of the switching step, such as:
  - Deenergize a section of the network.
  - Energize a section of the network.
  - Make a loop.
  - Break a loop.
  - Make a parallel. (The feeders involved in the parallel will be listed.)
  - Break a parallel. (The feeders involved in the parallel will be listed.)

This information is recorded into the step when the step is initially added to the switching sheet, but is not dynamically updated as changes are made to the sheet. You can enter text into this field to replace the text that is automatically inserted.



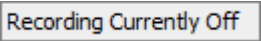






- **Status** displays the state of the switching sheet step. Possible states are Instructed, SCADA Pending, Completed, Partially Completed, Aborted, Failed, and Deleted (for red-lined steps only). See **Switching Sheet Step States** on page 9-27 for descriptions of these states.
- **Planned Date** displays the proposed date/time when this step will be performed. The Planned Date is used to generate more accurate and detailed Impacted Customer lists **and** to specify the ERT for the generated Planned Events. This date must be within the Start and Finish Dates specified on the Request tab. This date is automatically updated when the switching sheet's Start and Finish Dates are updated. Thus, if the work is rescheduled, the planned date values do not have to be manually updated as well.
- **Executed By** displays the user ID of the person who completed the step in real-time mode. This field is automatically populated by the system.
- **Completed Date** displays the date the step was completed. If this field is blank when a step is completed, failed, or aborted in real-time mode, then the system populates this field automatically. If you enter a date in this field before executing a step, that date is used instead. This allows you to specify when an action actually occurred. (This field is similar to the date field on the Control Tool.) If you attempt to edit this date after the step has been completed in real-time, the system checks to see if the step affects any jobs. If it does, the system prompts you to confirm that you want to change the affected start date or restoration date, as applicable, based on the event association.
- **Instructed By** displays the user ID of the person who instructed the step in real-time mode. This field is automatically populated by the system.
- **Instructed To** displays the ID of the crew to which the step was instructed. This field is automatically populated if a crew is selected in the Crew List on the Steps tab header when you instruct a step. This field cannot be edited manually.
- **Instructed Date** displays the date and time the step was instructed. If this field is blank when the step is instructed, then the system populates this field automatically. If you enter a date in this field before instructing a step, that date is used instead. This field cannot be edited after the step is in a terminal state (completed, aborted, or failed).
- **Address** displays the address of the device referenced in this step. This field is automatically populated if you record the step by initiating an action within the Viewer.
- **Comments** displays any additional information associated with this step. You can enter free-form text in this field.

















## Steps Tab Toolbar and Options Menus










The Steps tab toolbar displays a button for actions that you can perform. If a button is grayed, then that action is not currently permitted. For example, if you are currently in Study Mode, then the Start Study Session button is grayed. Some toolbar buttons, such as the Cut and Paste options, are also available through an options menu that is displayed when you right-click a step row. The options menu contains some options that do not appear on the toolbar.

The following table describes all actions that can be performed on the Steps tab with toolbar buttons, keyboard shortcuts, and/or options menu items.

To perform this action:		Comments
Turn record mode on	Click 	<p>Record mode must be on in order to record operations using the Viewer and Control tool.</p> <p>The toolbar button combines the <b>record on</b> action and text for the current recording mode state:</p>  <p>The status bar also provides the recording mode status:</p> 
Turn record mode off	Click 	<p>The toolbar button combines the <b>record off</b> action and text for the current recording mode state:</p>  <p>The status bar also provides the recording mode status:</p> 
Save all device addresses to the database	Click 	<p>If you change one or more device addresses in a switching sheet, this action updates the devices' addresses throughout the switching sheet and also updates the device attribute table so that any new switching sheets referencing these devices will use the new addresses.</p>
Focus Viewer 1 on the object referenced in the currently selected step	Click 	<p>By default, the master viewer is the VIEW1 Viewer.</p>
Instruct the selected steps	Click 	<p>This action is only permitted in real-time mode when the plan reaches Issued state. Note that steps cannot be instructed out of order. (You cannot instruct step 2 before you instruct step 1.) When you select this button, the Instructed By and Instructed Date columns are populated.</p>



To perform this action:	Comments
Complete the selected steps Click 	<p>Once the action is complete, the status of the step changes to Completed. If you are in real-time mode, the Completed Date column is also updated with the current date. Note that steps cannot be completed out of order. (You cannot complete step 2 before step 1 has been completed, aborted, or failed.) The Complete button is enabled in real-time mode when the plan reaches the Issued state.</p> <p><b>Note:</b> To complete a step in real-time mode, you must have authority over the device.</p>
Abort the selected steps Click 	<p>Use this action if a step was never attempted. When you click this button, the status of the step changes to “Aborted.” If you are in real-time mode, the Completed Date column is updated with the current date. However, the switching action is not actually performed. This action is only permitted in real-time mode and only for the next actionable step. (You cannot abort step 2 before step 1 has been completed, aborted, or failed.)</p>
Mark the selected steps as failed Click 	<p>Use this if a step was attempted but failed. When you click this button, the status of the step changes to Action Failed and the Completed Date column is updated with the current date. However, the action is not actually performed against the real-time data model. This action is only permitted in real-time mode and only for the next actionable step. (You cannot fail step 2 before step 1 has been completed, aborted, or failed.)</p>
Confirm that all model changes have been verified Click 	<p>Alternatively, choose <b>Model Verify</b> from the pop-up menu. This action is only available if model changes have occurred that impact one or more devices in the current switching sheet. For example, if a model build has changed a device’s alias or a model edit temporarily removed a device, then the affected steps are highlighted and this button is enabled. When this is enabled, you should check each step and take corrective action if necessary, such as deleting or re-recording a step. When you have verified all highlighted steps, click this button to confirm the verification and remove the highlighting.</p>
Reset study session and clear the status of the steps Click 	<p>This action is only available in Study Mode. When you click this button, you are prompted to select either Nominal or Real Time.</p> <ul style="list-style-type: none"> <li>Choose Real Time to replicate the real-time device states, which might include outages during a storm.</li> <li>Choose Nominal to reset all devices to their predefined normal state.</li> </ul>
Switch to current Real-Time Mode Click 	<p>This action is only available when you are in Study Mode. When you click this button, the status bar displays real-time mode in red and Viewer 1 changes to real-time mode.</p>
Switch to Study Mode Click 	<p>This action is only available when you are in real-time mode. When you click this button, the status bar displays study mode in gray and Viewer 1 changes to study mode.</p>
Find and replace text Click 	<p>Use this to find and replace all occurrences of a device (see <b>Finding and Replacing a Device in the Steps</b> on page 9-35) or text (see <b>Finding and Replacing Text in the Steps</b> on page 9-36) in the switching steps.</p>

To perform this action:	Comments
Cut steps to the clipboard Click 	<p>Select one or more steps. The selected steps are marked as being cut and are placed on the clipboard. The steps will only be moved after they have been pasted to their new location. Use the Paste option to paste the steps. This option is disabled if the sheet is not locked or the sheet state is Completed.</p> <p>Alternatively, right-click and choose <b>Cut</b> from the options menu or press <b>Control-X</b>.</p>
Copy steps to the clipboard Click 	<p>You can select one or more steps. The selected steps are copied to the clipboard. Use the Paste option to paste the steps.</p> <p>Alternatively, right-click and choose <b>Copy</b> from the options menu or press <b>Control-C</b>.</p>
Copy steps as go-back steps Click 	<p>You can select one or more steps. Reverse steps are created for each selected step and copied to the clipboard. Use the Paste option to paste the steps.</p> <p>Alternatively, right-click and choose <b>Copy as Go-Backs</b> from the options menu or press <b>Control-G</b>.</p>
Paste steps from clipboard Click 	<p>Steps are pasted after the currently selected step. The operation pastes the steps that were placed in the clipboard during the last Cut, Copy, or Copy as Go-Backs operation. Once the step(s) have been pasted, the Paste button is no longer available and the contents of the clipboard are cleared. This option is disabled if the sheet is not locked or the sheet state is Completed.</p> <p>Alternatively, right-click and choose <b>Paste</b> from the options menu or press <b>Control-V</b>.</p>
Delete steps Click 	<p>Deletes the selected steps from the plan. This button is disabled if the sheet is not locked or if the step has transitioned beyond its initial state (No State).</p> <p>Alternatively, right-click and choose <b>Delete</b> from the options menu or press <b>Control-D</b>.</p>
Undo the last action Click 	<p>Allows you to undo the last action (Cut/Paste, Copy/Paste, Delete, Add Step). The Undo function returns an error (<i>Undo is not supported across multiple sheets.</i>) when:</p> <ul style="list-style-type: none"> <li>attempting to undo pasting steps cut from another switching sheet</li> <li>the last action was not on the currently active sheet; for example, if you insert a step on Sheet A and then switch to Sheet B and click Undo.</li> </ul> <p>Alternatively, right-click and choose Undo from the options menu or press <b>Control-Z</b>.</p>

To perform this action:		Comments
Return to Nominal	Click 	<p>The Return to Nominal function generates a block of switching sheet steps that contain all the steps needed to switch the affected devices back to nominal. They will be presented in a logic order, will not outage any customers, and are logically grouped.</p> <p><b>Note:</b> the block is not go-back steps.</p>
Add a Safety Document	Click 	<p>The Create Safety Document button has different actions based on whether a step is selected or not.</p> <ul style="list-style-type: none"> <li>If a step is selected, the Select Safety Type dialog may prompt you to select the type of safety document (if the type cannot be determined automatically). If the step selected is not valid for safety documents, an error is returned.</li> <li>If no step is selected, the Select Safety Type dialog will open to allow you to select a safety document type.</li> </ul> <p>Once a safety document type has been determined or selected, the safety document dialog opens. This option is disabled if the sheet is not locked or the sheet state is Completed. See <b>Working with Safety Documents</b> on page 9-63 for more detail.</p>
Unlink from a Safety Document	Click 	<p>Unlinks (removes the association to) a device from a safety document's device list. First, select the step with the device operation you want removed from the safety document, then click the button. See <b>Removing Devices</b> on page 9-68.</p>
Complete all steps up to the selected step in 'silent' mode	Click 	<p>Use this action to complete all steps up to and including the selected step in 'silent' mode, which means that the system will auto-complete the operations without displaying the Look Ahead window. This option is only available in Study mode if you select a single row that has not already been completed. This is useful if you need to get a study session back to a point where you previously left off.</p> <p>Alternatively, right-click and choose <b>Complete to Here</b> from the options menu.</p>
Execute FLISR plan	Click 	<p>Executes the entire FLISR plan. Applies only to FLISR switching sheets.</p>
Clear all FLISR actions	Click 	<p>Clears all FLISR action conditions. Applies only to FLISR switching sheets.</p>
Show or hide events and crews	Click  to show or  to hide the header	<p>Shows or hides the Events and Crews pane, which displays crew and event associations. See <b>Steps Tab Events and Crews Pane</b> on page 9-26.</p>
Show Manual Step Addition Form	Click 	<p>Shows the Manual Step Addition pane, which allows you to add steps without using the Control Tool. See <b>Adding Steps Manually</b> on page 9-29.</p>

To perform this action:		Comments
Add a new block header	Right-click and choose <b>Add New Block Header</b> from the pop-up menu, then select the block type	Inserts a new block header of the selected type: Isolate, Fault Location, Maintenance, Restore, Construction, or Custom. If you choose Custom, you are prompted to enter the block header name. See <b>Adding a New Block Header</b> for more information. This option is disabled if the sheet is not locked or the sheet state is Completed.
Clear the Planned Date field for this step	Right-click and choose <b>Clear Planned Date</b> from the options menu	This action is only available if the step has a value in the Planned Date column. Clicking this button removes the date and leaves the Planned Date column blank. This option is disabled if the sheet is not locked or the sheet state is Completed.
Group steps	Right-click and choose <b>Group Steps</b> from the options menu	Groups the selected steps and draws a bracket around them in the Steps list. This allows steps to be completed out of order within the grouping. See <b>Grouping Steps</b> on page 9-33. This option is disabled if the sheet is not locked or the sheet state is Completed.
Ungroup steps	Right-click and choose <b>Ungroup Steps</b> from the options menu	Ungroups the selected steps and revises or removes the group bracket. (If you ungroup the third of three steps, the first 2 remain grouped.) See <b>Ungrouping Steps</b> on page 9-33. This option is disabled if the sheet is not locked or the sheet state is Completed.
Insert a blank step	Right-click and choose <b>Insert Blank Step</b> from the options menu.	Inserts a new blank step after the currently selected step. This is useful for adding comment steps. See <b>Adding Comment Steps</b> on page 9-29 for more information. This option is disabled if the sheet is not locked or the sheet state is Completed.
Mark the location where steps should be inserted	Right-click and choose <b>Place Step Insertion Indicator</b> from the options menu.	Designates where newly recorded steps should be added. When you choose this option, a visible marker appears. The next recorded step is inserted after the marker. Each time you add a recorded step, the marker moves down to the newly recorded step, so that steps are added in the order in which they were recorded. This option is disabled if the sheet is not locked or the sheet state is Completed.
Remove step insertion indicator	Right-click and choose <b>Remove Step Insertion Indicator</b> from the pop-up menu	When you click this option, the indicator is removed and any newly recorded steps are added to the end of the steps list. This action is only available when the step insertion indicator is showing.
Load the associated safety documents	Right-click and choose <b>Load Safety Document(s)...</b> from the pop-up menu	If any of the selected steps are associated to a safety document, then that document will be loaded for each step. The document type and number appear in the Operation column of the step when there is an association.
Move the crew symbol to a new device in the Viewer	Right-click and choose <b>Move Crew</b> from the pop-up menu	When this option is selected for a step with a crew instruction, the crew symbol within the Viewer is moved to the device specified in that step. This feature is only used to move the crew symbol within the viewer.
Move a column in the Steps list	Click the column heading and drag it to the desired position	This allows you to rearrange the order in which columns are displayed. For example, if you want each step's status to display in the first column, click the Status column header and drag it to the left of the Step # column.







## Steps Tab Events and Crews Pane

The **Events and Crews** pane provides information on the events and crews associated with the sheet. Use the **Show Event and Crews** () and **Hide Events and Crews** () buttons on the Steps tab toolbar to expand and minimize the pane.

### Events List

The **Events List** lists all events associated with the switching sheet. If you created a switching sheet from the Work Agenda Event List, the associated event is automatically displayed in the Events list. Use this list to view, add, and remove event associations and to view more information about the events. (For more information about associating events to switching sheets, see **Event Associations** on page 9-61.)

The Events List displays the following fields and buttons:







- The **Event** column displays the number of the associated event.
- The **Association** column displays the type of association. The list can have the following types of associations and will be listed in the order of Master, Planned, Forced, Manual and Canceled. Manual event associations are event associations that are added using the Add Event Association button on this window.
- The **# Out** column displays the number of customers outaged by this event.
- The **Status** column displays the status of the event, such as NEW, P-NEW (New Planned Event), or W-ASN (Master Switching Event).
- The **Device** column displays the name of the device.
- The  **Add Event Association** button opens a dialog box that allows you to enter an event number to associate with the switching plan. The event number can also be populated by selecting an event in the Work Agenda Event List. These events will show up as “Manual” associated events within the Events list. See **Event Associations** on page 9-61 for more information.
- The  **Remove Event Association** button removes the selected event association from the switching plan. This button is enabled only for Manual associated events. This option is disabled if the sheet is not locked or the sheet state is Completed.
- The  **Event Details...** button displays the Event Details window for the selected event.
- The  **Call...** button displays the Trouble Info window for the selected event.
- The  **Highlight in Work Agenda** button selects the event within the Work Agenda Event List.
- The  **Show in Viewer 1** button focuses Viewer 1 on the associated device.

### Crews List

The Crews List displays crews that are associated to the switching sheet; they may be directly associated using Crews List **Select Crew...** function or by virtue of being assigned or en route to an associated event. If you created a switching sheet from the Work Agenda Event List, any crew associations are automatically displayed in the Crews list on the Steps tab header.

The Crews List displays the following information:

- The **Crew ID** column contains the crew ID of the crew.
- The **Event** column contains the event number the crew is assigned or en route to.
- The **Contact** column contains the contact name for the crew.
- The **Mobile #** column contains the contact’s mobile phone number.
- The **Pager #** column contains the contact’s pager number.

- The **ASN/ENR Date** column contains the date and time of when the crew was assigned or placed en route to the event shown in the Event # column.
- The **Status** column indicates whether the crew is assigned or en route to the event shown in the Event # column.
- The **Type** column contains the crews' type (e.g., Trouble).
- The  **Crew Info** button displays the Crew Information window for the selected crew. This button is enabled only if a crew is selected from the list. For more information, see **Associating Crews** on page 9-39.
- The  **Update 'Instructed To' in Steps** button updates the Instructed To column for the selected steps with this crew's ID. This option is disabled if the sheet is not locked or the sheet state is Completed.
- The  **Move Crew** button allows you to move a crew to the device associated with the selected step. This button is enabled only when the selected crew is en-route or on-site to the associated event.
- The  **Select Crew...** button opens the Select Crew dialog from which you may select a crew to associate to the switch plan.
- The  **Remove Crew** button removes the selected crew from the table if they were added with the  **Select Crew...** function and are not assigned, en route, or onsite.

## Switching Sheet Step States

Switching sheet steps go through stages or states, just like switching sheets. Step states are described below:

**Note:** The status of steps that are executed in Study mode is prefixed with a two-character text string. (The default prefix is "ST," but this is configurable during system implementation.) Thus, a step that was completed in real-time mode would display the status "Completed," while a step completed in Study mode would display "ST Completed."

- **No state** - No action is associated with the step.
- **Instructed** - The step was instructed.
- **Completed** - The step was successfully completed.
- **Partially Completed** - This state applies only to parent aggregate steps and indicates that some but not all child steps were completed.
- **SCADA Pending** - This state applies only to actions that the system identifies as SCADA actions (*i.e.*, actions on telemetry-controlled devices). It indicates that a SCADA action was instructed.
 

**Note:** If the system detects that the device was operated as instructed, the step state is then changed from SCADA Pending to Completed. If an error or timeout occurs, the step remains in SCADA Pending state.
- **Deleted** - The step was deleted from the sheet.
- **Aborted** - The step was marked as aborted by the user. (A step transitions to this state when the user selects the **Abort** option on the Steps toolbar.)
- **Failed** - The step was marked as failed by the user. (A step transitions to this state when the user selects the **Fail** option on the Steps toolbar.)

Note that a terminal action (Complete, Delete, Abort or Fail) must have been taken for each of the switching steps before a sheet can be completed.

## Adding Recorded Steps to a Switching Sheet

Follow these steps to add recorded steps to a switching sheet using the Viewer and the Control Tool.

### Notes:

For information about adding steps to an emergency switching sheet, see **Emergency Switching** on page 9-59.

To record safety state transition steps (steps that are associated to safety documents), see **Adding Safety State Transition Steps** on page 9-65.

1. Create or open a switching sheet (as described earlier) and display the **Steps** tab.
2. Select the step after which you want the recorded steps inserted. Right-click this step, then choose **Place Step Insertion Indicator** from the options menu. By default, steps are added to the end of the list.
3. If the Viewer is not displayed, open a Viewer by clicking the **Viewer 1** button on the Web Workspace toolbar or selecting **Viewer 1** from the Tools menu.
4. Verify that Web Switching Management is in Study Mode.
  - To enable Study Mode, click the **Switch to Study Mode** button on the Steps tab toolbar. The status bar should display “Study Mode.”
5. Verify that Viewer is in Study Mode.
  - To enable Study Mode, select **Study** from the Options menu.
6. Verify that recording is enabled.
  - To turn recording on, click the **Record Off** button on the toolbar. When recording is enabled, the toolbar displays Record On in red.
7. In the Viewer, search for the device on which you want to perform an operation.
8. Double-click the device. The Control Tool opens.
9. Select the action you want to perform. For example, to open a device, click **Operate** and then select **Open** from the list of operations. To place a tag on a device, click **Tag** and then select **Place Tag**.
10. If the step involves a device operation, the Look Ahead window opens. Click **Open** or **Close** in the Look Ahead window to continue.




**Note:** The Look Ahead window informs you of the results of the operation, including the creation of parallels and loops, the number of critical customers affected, and related abnormal devices and conditions. You may be required to view additional tabs, such as View Conditions, before you can close the Look Ahead window.


11. Click **Cancel** on the Control Tool dialog. The device is updated in the Viewer and a step is added to the steps list. The new step is automatically selected.




## Adding Steps Manually

The **Manual Step Addition** form allows you to add steps to a switching sheet without using the Control Tool. To add a step manually, complete the following steps:

1. Click the **Manual Step Addition** (  ) button to display the Manual Step Addition form.
2. In the Manual Step Addition form, add the device information to the **Device** field using one of these methods:
  - Select the device in the Viewer and, with your cursor active in the Device field, click the **Set Device** (  ) button. The device field will be populated with the device alias of the selected device.
  - Enter a partial device alias and search for it by clicking the **Search** (  ) button to open the **Select Device** dialog. Select the device and click **OK**.
  - Enter a device alias directly. When you tab out of the field, the system will validate that the device; if the device is not valid, the field will be highlighted to indicate that it should be corrected.
3. Select Phases. If operating on a specific phases, uncheck the phases that will not be affected by the step.
 

**Note:** If a valid device is selected, only the phases which apply to that device are displayed. Otherwise, A, B, and C are all displayed.
4. Add the Operation. The operation field is made up of two parts: a short operation code and an operation description. Clicking in either part and clicking the **Search** (  ) button will open the **Select Operation** dialog, which is filtered based on device type to only display operations valid for the device. Select an operation and click **OK**.
 

**Note:** once you know the codes, it may be quickest to enter the code directly. If the operation code is invalid, the background of both fields will be red and the second text field will be blank. If the operation code is valid, the background of both fields will be white and the second field will display the operation description corresponding to the typed in operation code
5. Click the **Add Step** (  ) button to add the manual step to the switching steps.

## Adding Comment Steps

You can add comment steps that are not related to a specific device or operation. To add a comment step, select the step after which you want the comment step inserted. Right-click this step, then choose **Insert Blank Step** from the options menu. With the row selected, click in the Operation column to enable adding a description of this step; the Details column is also available for descriptive text.

**Note:** You may enter text in the Operation, Details, Address, and/or Comments fields. You can also specify Date fields for the step. The other fields are populated automatically when you instruct and complete the step.

## Resetting Operation Text

Operation text that has been manually entered may be reset to its original value by following the following steps:

- Right-click to select the row and open the option menu.
- Select **Reset Operation Text**. The **Reset Operation Text** dialog will open to confirm that you want to change the Operation text back to its original value.
- Click **Yes** to reset the value.

**Note:** click **No** to close the dialog and leave the Operation text unchanged.

## Copying and Pasting Steps

You can copy or cut steps and then paste them to another location within the step list or into another switching sheet. When you cut steps, they are marked as 'cut' in the steps list and are copied into the clipboard. When you copy steps, they are copied to the clipboard, but the original steps are not marked or removed from the list.

**Note:** The in-order step execution rules are not enforced when cutting and pasting steps. Switching steps that were previously completed can later be cut and pasted into any location within the step list. This also pertains to cutting and pasting steps from one sheet to another.

If you cut and paste steps from one sheet to another, the system determines which events have associations with these steps and automatically moves the corresponding event/sheet associations from the old sheet to the new sheet. If you attempt to move some but not all of the steps for an event, the system displays a confirmation dialog indicating the affected events. If you confirm the action, then both the old sheet and the new sheet will have an association to the affected events. Any step moves that affect event associations are recorded in the audit log for tracking purposes.

Follow these steps to use the cut, copy, and paste functions:

1. Select the steps you want to cut or copy.
2. Click the **Copy Steps** or **Cut Steps** button (or right-click the selected steps and choose **Copy** or **Cut** from the options menu).
3. Select the step after which you want the steps inserted and click the **Paste Steps** button (or right-click the step and choose **Paste** from the options menu). Any cut steps are moved, and copied steps are duplicated.

**Note:** Once the step has been pasted, the Paste button is no longer available and the contents of the clipboard are cleared.

## Creating Go-Back Steps

When you are creating a switching sheet in Study Mode, you can automatically generate a sequence of switching steps to “go-back” to the original state. The Go-Back feature creates a new sequence of steps that reverses the existing sequence. For example, assume that Step 1 involves opening a device. If you select this step and choose Copy as Go-Backs, the system creates a step to close that device and copies the step to the clipboard. You can then paste the step in the appropriate location in the step list.

To create go-back steps for one or more steps, do the following:

1. Select the step or the range of steps you want to create reverse actions for.
2. Click the **Copy As Go-Backs** button (or choose **Copy as Go-Backs** from the options menu). Go-Back versions of the selected steps are copied to the clipboard.

**Note:** If you selected one or more steps that are part of an aggregate step, all steps within the aggregate are automatically selected and copied as go-back steps. (An aggregate step is an operation, such as Open and Tag, that comprises two or more sub-steps, numbered a through z.)

3. Select the step after which you want the go-back steps inserted and click the **Paste Steps** toolbar button (or choose **Paste** from the options menu). The steps are pasted after the selected step.

## Working with Blocks

Blocks are used to organize steps based on stages of execution. A block is a series of contiguous steps that can include both single (ungrouped) steps and groups of steps. The figure below shows an “Isolate” block that is expanded to display 7 steps, and a “Restore” block that is collapsed so that its steps are hidden.

Step #	Version	Operation	Device
Isolate	4		
1		4Place Note	S3141
2		1Close S2903 on phases ABC (HOT #1017)	S2903
3		1Close S3164 on phases ABC	S3164
4		1Open S3104 on phases ABC	S3104
5		1Place Tag S2981 on phases ABC	S2981
6		1Open S3142 on phases ABC	S3142
7		1Open S3140 on phases ABC	S3140
Restore	1		

Note the following when working with blocks:

- When you create a new sheet, the system creates an empty block named “Default.” When you add steps, they are added to this block by default. You can delete this block and create a new top-level block if you wish.
- The system provides several pre-configured block headers – Isolate, Fault Location, Maintenance, Restore, and Construction – or you can create your own custom header. The header is simply the block name that is displayed in the Steps list.
- To expand a block and display its steps, click the + symbol to the left of the block name. To collapse a block and hide its steps, click the - symbol.

- All steps within a block must be completed before a step within another block can be completed, unless the block names are the same and the blocks are adjacent (not separated by any blocks of different names). See the **Parallel Step Execution** on page 9-32 for more information about parallel execution of block steps.

### Adding a New Block Header

To add a new block header to the steps list:

1. From the Steps tab, right-click the step after which you want to insert a block. A options menu appears.
2. Select **Add New Block Header**, then select a block header type: Isolate, Fault Location, Maintenance, Restore, Construction, or Custom.

**Note:** If you choose Custom, you are prompted to enter the block header name.

A new block header row is added to the steps list.

### Parallel Step Execution

Parallel execution allows an operator to direct one crew through a set of steps in one block and another crew through a set of steps in another block. This provides the operator more flexibility when executing switching steps and more closely correlates with their actual business process.

Blocks of steps with the same block names can be executed in parallel. The blocks must be sequentially listed and cannot be separated by different blocks of steps. For example, parallel execution is allowed when blocks are ordered (*e.g.*, Isolate, Isolate, Restore, Restore); parallel execution is not allowed if blocks are separated by different block names, such as Isolate, Restore, Isolate, Restore.

When you execute a block step, the system checks to see if the previous block has the same name. If it does, the system ignores any incomplete steps within these blocks, but requires that you complete the steps within each block in order. If steps are grouped within a block, normal grouping rules apply. (See **Grouping and Ungrouping Steps** on page 9-33).

Below is an example of how you might create and execute a plan using parallel step execution:

1. Create a Planned switching sheet.
2. From the Steps list, right-click on the Default block step. Select **Add New Block Header** and then select the Isolate option.
3. Record one or more steps into the Isolate block for a single feeder.
4. Add another Isolate block at the end of the first block.
5. Record one or more steps into the second Isolate block for a different feeder.
6. Create two Restore blocks after the second Isolate block.
7. Create go-back steps for the first of the Isolate blocks. Paste the go-back steps into the first Restore block.
8. Repeat the previous steps to create and paste go-back steps into the second Restore block.
9. In Study mode, complete the first step in the first Isolate block. The step is completed.
10. Complete the first step in the second Isolate block. The step is completed.
11. Continue executing steps in parallel for both Isolate blocks and then both Restore blocks.

**Note:** Parallel execution is not required in this situation; it is simply available as an option.

## Grouping and Ungrouping Steps

Normally, each step in a switching sheet must be completed in order -- you cannot complete step 2 until step 1 has been completed. However, you can group two or more steps together so that the steps within the group can be completed in any order.

The following rules apply when grouping and ungrouping steps:

- All steps preceding a group must have been completed before you can complete any steps within the group.
- Steps within a group can be completed in any order.
- All steps within a group must be completed before the next step or next group of steps can be completed.
- Step groupings cannot cross over Block boundaries.
- Step groupings can be removed and altered (ungrouping and regrouping) at any time. Note that this may impact which steps can be completed next based on step completion rules.

This section includes the following topics:

- **Grouping Steps**
- **Ungrouping Steps**
- **Adding Steps to an Existing Group**
- **Grouping Aggregate Steps**

### Grouping Steps

To group steps:

1. Select two or more contiguous steps. Remember that the grouping cannot cross Block boundaries.
2. Right-click and select **Group Steps** from the options menu. A blue bracket appears in the step number column to visually indicate the newly formed grouping, as shown in the following figure:

Step #	Version	Operation	Device
Isolate	4		
1		4Place Note	S3141
2		1Close S2903 on phases ABC (HOT #1017)	S2903
3		1Close S3164 on phases ABC	S3164
4		1Open S3104 on phases ABC	S3104
5		1Place Tag S2981 on phases ABC	S2981

**Note:** Groups cannot span more than one block. If you attempt to group steps that span two or more blocks, the system will create separate groups within each block.

### Ungrouping Steps

You can ungroup some or all steps in a group. To ungroup steps:

1. Select one or more steps that are currently part of a group.
2. Click the right mouse button and select **Ungroup Steps** from the options menu.

The bracket is removed (if all steps were ungrouped) or redrawn to indicate the steps that remain grouped. If the selected steps were in the middle of a grouping, then two new groups are created, and the middle steps are no longer grouped.

### Adding Steps to an Existing Group

You can add one or more steps to an existing group as follows:

1. Select the steps you want to add and include at least one step from the existing group.
2. Click the right mouse button and select **Group Steps**.

The selected steps that were previously ungrouped are added to the existing group.

### Grouping Aggregate Steps

An aggregate step is an operation, such as Open and Tag, that comprises two or more sub-steps (numbered a through z). An aggregate step is treated as a single step when grouping and ungrouping steps:

- If you add any sub-step of an aggregate step to a group, then all sub-steps are added to the group.
- If you ungroup any sub-step, then all sub-steps are removed from the group.

### Editing Existing Steps

You can rearrange, add, and delete switching steps using options found on the Steps toolbar or from the Steps options menu.

#### Notes on editing steps:

- You cannot edit steps after the switching sheet has been completed.
- Some fields on the switching sheet are not editable after a plan has transitioned to a certain set of states. For example, the Instructed Date and Completed Date fields cannot be updated after the step has reached a terminal state (completed, aborted, or failed).
- Tabbing out of a cell can only be accomplished if the cell is not set up for word wrapping.
- The Operation, Details, and Comments columns are configured for word wrapping. Word wrapping means the cell height will grow if the text in the field is too long to be displayed within the confines of the cell width.

To edit switching steps, complete these steps:

1. Open the switching sheet and check the status bar to make sure that the switching sheet is locked.
2. Click on the **Steps** tab.
3. Edit steps as follows:
  - To edit the fields in a step, select the row and click in the Operation (for comment steps only), Details, Planned Date, Instructed Date, Completed Date, Comments or Address field and change the text.
  - To insert a blank step, place your cursor in the row after which you want to insert the step and select the right-click **Insert Blank Step** option.
  - To insert a recorded step, select the right-click **Place Step Insertion Indicator** option and then perform the action in the Viewer. Steps are inserted after the step that currently has the indicator. To record steps at the end of the steps list, remove the step insertion indicator first.
  - To delete a step, select the row for the step you want to delete and click the **Delete** button. This button is disabled if the step has transitioned beyond its initial state (No state).
  - To rearrange steps, cut and paste the steps to the desired location.

- You can cut, copy and paste steps from one plan to another. The ability to cut, copy or paste is governed by the sensitivity of the edit options. (The options are disabled if the edit operation is not allowed.)
4. Save the switching sheet by selecting **Save Sheet** from the File menu.

## Finding and Replacing a Device in the Steps

The **Device** tab of the **Find and Replace** dialog allows you to find and replace occurrences of a device in the switching steps. This is helpful for finding a device in a switching sheet that has many steps. You can also use this function if you are reviewing a switching sheet and find that the wrong device was entered in a number of places.

To find occurrences of a device within the Steps list, complete these steps:

1. Open the switching sheet in the Web Switching Management window.
2. Click on the **Steps** tab.
3. *(Optional)* Select a step with a valid device name within the Steps list.
4. Click the **Find and Replace...** button on the Steps tab toolbar. The **Find and Replace** dialog box opens.
5. Click the **Device** tab, if not already selected. The Find field displays the selected step's device alias, if selected the optional step above. Otherwise, enter a device ID in the Find field.
6. Click the **Find Next** button to navigate through the list of steps, highlighting each occurrence of that device.

To replace a device, complete these steps:

1. Open the switching sheet in the Web Switching Management window.
2. Click on the Steps tab.
3. *(Optional)* Select a step with a device that you wish to replace.
4. Click the **Find and Replace...** button on the Steps tab toolbar. The Find and Replace dialog opens. If a device ID was not preselected above, enter a device ID in the Find field.
5. Select a device from the Viewer. The Replace With field is populated with that device's alias. The New Phases column indicates the phase options of the newly selected device. By default, the ALL Phases option is selected.
6. If the device you are replacing is used in a grounding operation, click the **Ground Node** option menu and select the secondary device from the list.
7. Click **Replace**.

**Note:** if you are replacing a device association on a step that has had its Operation text modified, a **Reset Operation Text** dialog will open asking you if you want to reset the operation text. You will have three options:

- Click **Reset** to reset the text;
- Click **Continue** to keep the manually entered Operation text.
- Click **Cancel** to cancel the device replace.

For more information, see **Resetting Operation Text** on page 9-30.

## Finding and Replacing Text in the Steps

The **Text** tab of the Find and Replace dialog allows you to find and replace occurrences of text in editable fields within the switching steps.

**Note:** Not all editable fields allow Find and Replace; the project configuration determines what fields are editable.

To find occurrences of a device within the Steps list, complete these steps:

1. Open the switching sheet in the Web Switching Management window.
2. Click on the **Steps** tab.
3. Click the **Find and Replace...** button on the Steps tab toolbar. The Find and Replace dialog opens.
4. Click the **Text** tab, if not already selected.
5. Enter the search term in the **Find** field.
6. Click the **Find Next** button to navigate through the list of steps, highlighting each occurrence of that device.
7. To replace an instance of the search term, enter the replacement text in the **Replace with** field and click **Replace**. Repeat as necessary.


## Focusing on a Device in a Step

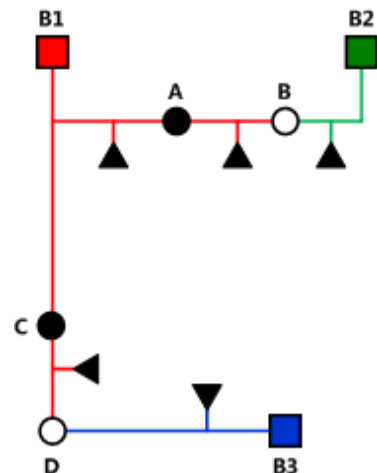
When reviewing a switching sheet, you can focus on a device in the Viewer 1 window to better understand the conditions present in the area of the device. To focus the Viewer window on the device in a switching step, select a step on the Steps tab and then select the **Object Focus** button on the Steps tab toolbar. The Viewer loads the appropriate map and focuses on the device.

## Example Return to Nominal Scenarios

The following scenarios shows using Return to Nominal for switching actions on the diagram to the right.


**Example 1** - Simple load balance planned switching action.

1. The user creates a Planned Switching sheet to move load from one feeder to another:
  - Close **B** -- make a parallel
  - Open **A** -- break a parallel
  - Close **D** -- make a parallel
  - Open **C** -- break a parallel
2. The user switches to Real Time mode and executes the steps
3. The user clicks the  button to generate *Return to Nominal* steps.
4. The switching plan will add the following new steps to the bottom of the plan, in a new *Return To Nominal* block:
  - Close **C** -- make a parallel
  - Open **D** -- break a parallel
  - Close **A** -- make a parallel
  - Open **B** -- break a parallel





**Example 2** - First segment fault emergency switching plan.

1. The breaker B1 trips and creates a Real Outage due to a fault immediately downstream.
2. The user creates an Emergency plan for the outage
3. The new Emergency sheet is created and automatically lists:
  - Open **B1** -- Deenergize a segment
4. In Real Time, the user records new steps to partially restore the areas between **AB** and **CD**:
  - Tag **B1**
  - Open **A** - <blank>
  - Tag **A**
  - Close **B** -- energize a segment
  - Open **C** - <blank>
  - Tag **C**
  - Close **D** -- energize a segment
5. The user clicks the  button to generate Return To Nominal steps.
6. The switching plan adds the following new steps to the bottom of the plan, in a new *Return To Nominal* block:
  - Remove Tag **B1**
  - Close **B1** -- energize a segment
  - Remove Tag **A**
  - Close **A** -- make a parallel
  - Open **B** -- break a parallel
  - Remove Tag **C**
  - Close **C** -- make a parallel
  - Open **D** -- break a parallel

## Reviewing a Switching Sheet in Study Mode

You can review the actions of a switching sheet in a Viewer window. With the Viewer and Web Switching Management both in Study Mode, you can complete steps by selecting a step and clicking the **Complete** button on the Steps tab toolbar.

As the steps are completed, each one takes effect in the Viewer window and the words “Study Completed” appear in the Status column in the steps section. Steps are completed starting with the first step and continuing sequentially, however it is possible to complete steps out of order if the steps are part of a step grouping. (See **Grouping Steps** on page 9-33.)

The Look Ahead window informs you of the results of the operation, including the creation of parallels and loops, the number of critical customers affected, and related abnormal devices and conditions.

## Replaying Steps

You can replay steps in the Viewer window, allowing you to experiment with and make changes to a switching sheet. You can then add and delete switching steps and then select one of the two **Reset Study Session** options. After resetting your study session, you will be able to go through the steps again using the **Complete** button.

## Implementing a Planned Switching Sheet

Once you have created, studied, and approved a switching sheet, you can implement the plan. Implementing involves the following steps:

- **Scheduling a Planned Master Event**
- **Issuing a Switching Sheet** (includes associating a crew and printing the sheet)
- **Instructing and Completing Switching Sheet Steps**

### Scheduling a Planned Master Event

In order to schedule planned switching, you must have entries within the Start Date and Finish Date (ERT) fields on the Request tab. Note that if a Planned Event is partially restored, then the ERT is determined by taking the latest date from the restoration steps *Planned Date* values (see *Planned Date* on page 9-20). If only one of the restoration steps has a *Planned Date* value, then that value is used even if it is the first step to restore customers. The ERT of the Master event is only used when none of the restoration steps have *Planned Date* values.

**Note:** the calculated ERT is determined by using the Impacted Customer list, which must be generated for the functionality to work. If the list is not generated, then the ERT of the Master Event is used.

An optional device alias can also be specified within the Device field on this tab. Specifying a device will cause the planned Master Event to conform to the regular zone authority rules. If you do not have authority over the zone that the device resides in, then you will not see the planned Master Event that will be created when the switching sheet is scheduled.

To schedule a planned Master Event, complete these steps:

1. On the Request tab, fill in future dates and times within the Start Date and Finish Date entry fields.
2. To associate a particular device and control zone, select the device within the Viewer and click the **Link Device** button on the Request tab. If a device is not specified, then the Master Event will fall into the FUZZY control zone.
3. On the Tracking/Audit Log tab, click the button for the **Schedule** state. (If the Schedule button is not displayed, click through the available sheet state buttons until the Schedule button appears.) You can add a comment to each state transition if you wish.

At this point, a new planned Master Event has been created and associated to the switching sheet. This new event appears in the Events list as a Master Event. You can display the Event Details for the event from either the Work Agenda Jobs List or the Events list on the Steps tab.

#### Note

- The **Event Details** display is different for planned events than for spontaneous outage events. For instance, you cannot update the ERT for a planned event from Event Details. That has to be done from the associated switching sheet.

### Updating the ERT in Event Details

You can update the ERT for an event to match the date and time specified in the Finish Date field on the Request tab. The new date will be visible in Event Details the next time you load the event. To update the ERT, complete these steps:

1. Select **Switching...** from the Actions menu in the Event Details window. The associated switching sheet is loaded and the steps are displayed.
2. Select the **Request** tab and enter in a new Finish Date (ERT) date and time.
3. Select the **Update ERT** button, which is displayed next to the date and time entry fields. The Estimated Restoration Time (ERT) is changed for the associated Master Event within the

Work Agenda Jobs List. The new date is displayed in the Event Details the next time it is loaded for that event.

**Note:** This option is only available after the sheet has been scheduled. This button is displayed next to both the Finish Date and Alt. Finish Date fields. The button is grayed if no date has been entered yet for the field.

## Issuing a Switching Sheet

Once you have scheduled the plan, you should associate crews to the planned Master Event and then issue the switching sheet to the crew.

### Associating Crews

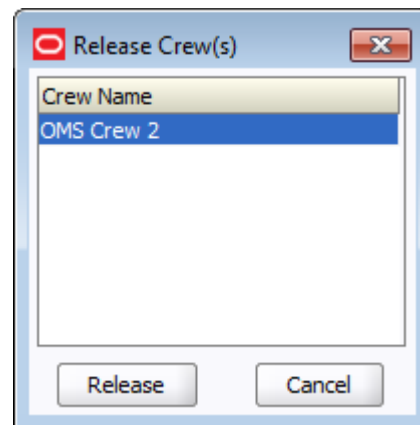
1. On the Tracking/Audit Log tab, verify that the switching sheet is in Scheduled state.
2. Find the Master Event for a planned switching sheet. (Right-click on the Master Event within the Steps tab Events list and click the **Highlight in Work Agenda** toolbar button.)
3. From the **Work Agenda Events List**, select the event. (Even though the event is highlighted, you must click on the event in the Work Agenda Events List in order to assign and dispatch crews to events.)
4. From the **Crew Actions** list, select the crew and then click the appropriate option on the Action menu: **Assign** or **En Route**. The Crew is listed in the Crew List on the Steps tab header, and the selected status is shown.

### Releasing Crews from an Event

To release one or more crews from an event, select the master event in the **Work Agenda** and select **Release Crew(s)...** from the Actions menu. The **Release Crew(s)** window opens with a list of all crews assigned to the selected event. One or more crews may be selected:

- Click on a crew name to select one crew.
- Click, hold, and drag to select multiple adjacent crews.
- Control-click to select multiple non-adjacent crews.

Once the crew(s) have been selected, click **Release** to release the crews from the event..



The Release Crew(s) window will close, the crew will no longer be associated with the event, and the crew symbology will disappear from the Viewer.

### Pre-Assigning Steps to Crews (Optional)

You can pre-assign steps to crews before issuing the switching sheet. With pre-assigned switching steps, the crew is automatically highlighted in the Crew List as the steps are instructed and/or completed. To pre-assign steps to a crew, select the appropriate steps and then select the crew

from the Crew List found on the Steps tab. (To select all the steps, select a single step and then press Control-A.) The Instructed To field for the selected steps is updated with the crew's ID.

**Note:** To clear (deselect) crew step assignments, select all the steps again, then press the Control key and click the crew in the Crew List. The Instructed To column is cleared for all steps that have not been instructed, aborted, failed or completed.

The plan is now ready for the crews to work the steps.

### Changing the Sheet State to Issued

When the plan is issued to the crew, change the sheet state to **Issued** on the Tracking/Audit Log tab. The sheet can now be printed (see the following section) and handed to the crew or sent via email, depending on how your crew assignments are handled.

### Adding and Removing Event Associations


Click the **Add Event Association** button (+) in the Steps tab header to associate an event with the switching plan. You can enter the event number or select an event in the Work Agenda Event List. The event will show up as a "Manual" associated event within the Events list.

Click the **Remove Event Association** button (X) to remove a manual event association from the switching plan. This button is enabled only for Manual associated events.

See **Event Associations** on page 9-61 for more information.

### Printing the Switching Sheet

To print the switching sheet:

1. Choose **File>Print...** from the Web Switching Management window (or click  on the main toolbar).
2. Select each section of the switching sheet you want to print:
  - Request
  - Events and Crews
  - Switching Steps
  - Impacted Customer List
  - External Documents
  - Safety Documents
  - Audit Log
3. Select the format for the print-out:
  - PDF
  - HTML
  - RTF
  - XML
4. Click **OK**. The Print dialog appears.
5. Verify that your printer is selected and click **Print**.

## Instructing and Completing Switching Sheet Steps

Once you have scheduled and issued a switching sheet, you are ready to instruct and complete the switching sheet steps. Instructing a step indicates that you have provided the step information to the individual performing the switching actions in the field.

### Overview

Note the following key information about instructing and completing steps:

- Instructing steps is only permitted in real-time mode.
- In order to begin instructing switching sheet steps, the sheet has to be Issued first. The Instruct and Complete buttons become enabled in real-time mode when the plan reaches the Issued state.
- Steps cannot be instructed out of order. (You cannot instruct step 2 before you instruct step 1.)
- Steps are not required to be instructed before being completed. It is up to you to decide if the step should be instructed first.
- To complete a switching sheet, the Web Switching Management window must be in real-time mode. (You can complete steps in Study Mode, but these actions do not affect the real-time data model.)
- Although a Viewer window does not need to be open to complete switching steps, it is helpful to view the steps in a Viewer window. The Viewer must be in real-time mode as well.
- For steps involving device operations, you must have authority over the zone where switching operations will take place, or the system will not allow you to complete the switching steps.
- If you attempt to operate a device to its current state, such as closing a device that is already closed, a dialog informs you that the device is already in its desired state. You can continue or cancel the operation. If you continue, the system marks the step as completed or instructed (depending on your action). If you cancel, no action is taken.

### Instructing and Completing Steps

To instruct and complete steps:

1. Verify that the Web Switching Management window and the Viewer are in real-time mode.
2. On the Tracking/Audit Log tab, verify that the status of the sheet is Issued.

#### Instructing the Step

3. Select the step you want to instruct.
4. If a crew was assigned to the switching plan and was not pre-assigned to any steps, then select the crew from the Crew List in the Steps tab header. (See the previous sections for instructions on associating crews to switching sheets and pre-assigning steps.)

**Note:** Automatic Crew List selection is based on the crew specified in the Instructed To field of the selected step. If the step does not display a crew in this field, then no crew will be selected in the Crews List.

5. When you give the instruction to the crew, click the **Instruct** button on the Steps tab toolbar.
6. If the step involves a device operation, the Look Ahead window opens. Click **Open** or **Close** in the Look Ahead window to continue with the step. (You may be required to view conditions associated with the operation before you can perform the operation.)

The status of the step changes to Instructed. The Instructed To column is populated with the assigned crew's ID, and the Instructed Date column is populated with the current date/time. An Instructed symbol appears on the device in the Viewer.

If the step involves issuing a safety document to a crew, then the value in the step's Instructed To field is copied to the safety document Crew ID field when the step is completed. The Safety Document dialog is displayed.

#### Notes on SCADA Actions:

If the step involves actions on a SCADA control and no crew has been selected, a confirmation dialog displays the following text: "Do you wish to send this request to SCADA?" If you click **Yes**, the step is instructed to SCADA, the request is sent to SCADA, and the status of the step is set to SCADA Pending. If you click **No**, the request is not sent to SCADA and the step is set to SCADA Pending (it will wait for telemetry in order to complete the step). This may be the case if a crew were instructed to perform the operation instead of a SCADA system. If you click **Cancel Action**, the operation is cancelled.

If the SCADA interface reports that the device was indeed opened, the step status is then updated to Complete. The switch opens in the Viewer and the instruct condition disappears.

If you select the Complete button before receiving information from SCADA, a confirmation dialog displays the following text: "SCADA telemetry only for selected device. Submit a manual entry?" If you click **Yes**, the status of the steps is set to Completed, and the switch opens with status of M (for MANUAL entry) in the Viewer. If the SCADA interface reports that the device was indeed opened, the MANUAL indicator disappears. If you click **No**, the action is cancelled.

For more information about SCADA, see **SCADA Extensions** on page 8-1.

#### Completing the Step

7. After the crew reports that the step is complete, select the step and click the **Complete** button.

The Status is updated to *Completed*. The Completed Date column is populated and the device status is updated in the Viewer window. If customers are impacted, then a new planned outage event is placed upon the device as well. This event will also appear in the Events list on the Steps tab header.

8. If the step is a safety state transition step, then selecting the Complete button will cause the safety document dialog to be displayed. Verify that the information on the safety document is correct and click the **Execute** button at the bottom of the display to complete the action. (For more information, see **Executing Safety State Transition Steps**.)

**Note:** All safety documents must be completed before you can complete the switching sheet. Also, in order to complete an Issue Safety State transition step, a crew must be specified in the Assigned Crew field. You can specify a crew by doing one of the following:

- Select a crew within the Crew List on the Steps tab.
- Select the **Crew List** button next to the Assigned Crew field on the safety document, then select a crew from the Select Safety Crew dialog.

9. Repeat steps 3-8 for each switching step you want to instruct and complete.

#### Recording Additional Steps in Real Time

10. Additional steps may be added to the switching sheet in real time when it is in the 'Issued' state. Click the record button and proceed to record the actions as issued.

#### Completing the Switching Sheet

11. When all steps have been completed, click the **Tracking/Audit Log** tab and set the sheet state to *Completed* by clicking the **Complete** button. The **Confirm State Transition** dialog

will open; click **Yes** to confirm the completion or click **No** to close the dialog without completing the sheet. The Finish Date may be updated, if necessary.

- *Optional:* add a comment in the text field to the right of the **Complete** button.

If any associated event has not been restored or if any safety document has not been completed, an error message is displayed indicating that the sheet cannot be completed.

Once the sheet is in the Completed state, any planned outage events are completed along with the planned master event. Any crews assigned or en route to the events are released as well.

**Note:** Once all the steps in a switching sheet are complete, the plan itself is considered complete. Setting the sheet state to Completed “locks” the switching sheet so that no further modifications may take place for this sheet. A Completed sheet cannot be transitioned to any other state.

## Moving a Crew

Crews are automatically relocated as steps are instructed to them. As steps are completed, crews are moved to the appropriate device based on the remaining instructed and non-complete switching steps. If all steps have been completed, the crew is moved back to the master device or the previously operated device, depending on the configuration. (If configured to go back to the master device and one is not given, then the crew disappears from the Viewer.)

You can manually move a crew to the device associated to the selected switching step. This option is available only if the step is instructed and has been instructed to a crew. This option allows you to move a crew to a different device when multiple steps have been instructed to a crew.

To move a crew to a device, follow these steps:

1. Associate the crew to the planned switching sheet as described in **Associating Crews**.
2. Transition the sheet to the Issued state, if it is not already.
3. Select the crew within the Crew List on the Steps tab header.
4. Instruct all steps in the sheet. Note that within the viewer, the crew initially moves from master device to the first instructed device and then to the next.
5. From the Steps list, right-click on an instructed step and select **Move Crew** from the options menu. The crew moves to the device associated to the selected step.

## Working with Switching Sheet Versions

Switching sheets use a version control mechanism in order to keep operators and crews consistent with regards to which switching sheet they are viewing. The switching sheet as a whole has a version number, and steps can also have version numbers.

The following describes how sheet version control works and presents examples of how the version and editing mode change as actions are taken on a switching sheet.

- When you first start a sheet, the sheet version is 1. The sheet’s version number and editing mode are displayed in the **Status Bar** at the bottom of the switching sheet. The new sheet is considered to be in Editing mode until it is checked in.

Action	Resulting Version and Editing Mode
Initial sheet is created	Version: 1 (Editing)

- When the sheet transitions to Issued state or whenever a switching step is instructed or completed in real-time mode, the system automatically checks in the current version of the

switching sheeting, but the version number is not incremented until you make changes, which will create a new version.

Action	Resulting Version and Editing Mode
Sheet transitions to Issued State, triggering automatic check-in	Version: 1 (Checked In)

- If you make switching step changes after the sheet has been checked in or change any field in the sheet, the system automatically creates a new version and increments the sheet's version number.

**Note:** Your system's configuration determines which fields trigger a version change when edited. By default, a new version is created when any field is changed.

Action	Resulting Version and Editing Mode
Steps are added, triggering version update	Version: 2 (Editing)

- You can manually check in changes at any time. This creates a saved version of the sheet that you can refer back to later. It also makes the checked-in version available to other users who view the sheet. The Check In button is displayed in the **Status Bar** at the bottom of the switching sheet when the sheet is in Editing mode. When you click the Check In button, the current version is checked in, and the Check In button changes to Create New Version.

Action	Resulting Version and Editing Mode
User manually checks in version, using Check In Version option	Version: 2 (Checked In)

- You can manually increment a sheet's version after the sheet has been checked in using the Create New Version button. When you manually increment the version, the system creates a new version of the sheet in Editing mode.

Action	Resulting Version and Editing Mode
User manually increments version using the Create New Version option	Version: 3 (Editing)

- You cannot make changes to a switching sheet after it has been completed. Once a sheet is completed, it is locked and cannot be edited any further.

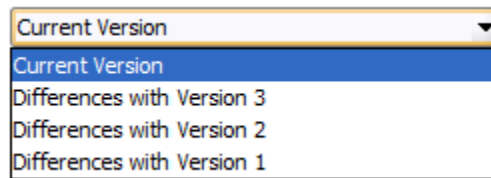
## Step Versioning

Steps also have version numbers. The step version number is the version number of the sheet when the step was added. A step's version number is displayed on the Steps tab to the right of the step number.

- If you add steps to a checked-in switching sheet, the sheet version is automatically incremented and the newly added steps are associated to this new sheet version number. This allows you to easily distinguish between steps that were previously issued to a crew and newly added steps.



- To see the differences between the current version and a previous version, open the version drop-down on the status bar, then select the version to compare against.



When you select a version, the Step # column uses outline numbering (1.1, 1.2) to identify steps that were added since the previous version.

If you delete a step when the switching sheet version is checked-in or when an earlier version of the step exists, then the step is removed from the current version. If you view a previous version in which the step existed, the deleted step is shaded red.

Step #	V...	Operation	Device	Status	Pla
Planned	1			Deleted	
Isolate	4				
0.1		4Place Note	S3141	ST Completed	
1		1Close S2903 on phases ABC (HOT #1017)	S2903	ST Completed	
2		1Close S3164 on phases ABC	S3164	ST Completed	

## Viewing Impacted Customers

The Impacted Customers tab displays a list of all customers affected by the switching step operations. It also shows the total number of customers in the interrupted, isolated, and restored states:

- Interrupted:** customer had power at the start of the switching operation, lost power (at some point) during the operation, and had power again at the end of the operation.
- Isolated:** customer had power at the beginning of the operation and had no power at the end of the operation.
- Restored:** customers who were without power during the operation and had power at the end of the operation.

### Important Note:

Service Alerts for planned events are triggered by the Impacted Customers List. Alerts will not be sent if the Impacted Customers List is not generated.

The following rules apply to the Impacted Customer list:

- Whenever the system determines that a plan will impact customers, the Impacted Customers indicator is displayed on the status bar. If the sheet is later changed and customers are no longer impacted, then the indicator is removed.
- If a customer will be impacted multiple times during a sheet's execution, the customer is listed multiple times in the list.
- If no Planned Dates are specified for the device operations relating to an item in the list, then the dates will come from the sheet's Start and Finish Dates, which are required to generate the impacted customer list.
- The list can only be regenerated in study mode, since it displays the list of customers that will be impacted when the plan is executed and it uses your study session to calculate that list. See **Generating the List** on page 9-47 for more details.
- The list is not affected by the Real-Time execution status of the steps. The Work Agenda, Event Details, and Event Log are the source for Real-Time outage data.

This section includes the following topics:

- **Using the Impacted Customers Tab**
- **Color Coding**
- **Generating the List**
- **Deleting and Restoring Customers from the List**
- **Moving Customers**


## Using the Impacted Customers Tab






The Impacted Customers tab displays a list of impacted customers in a hierarchical, or tree, format -- just like Windows Explorer. The top level of the hierarchy is date/time the customer is impacted. Within date/time, the list displays each supply node along with the restore date/time. Within each supply node is a list of customers. You can expand or collapse any level of the hierarchy by clicking the + or - icon.

The Impacted Customer list displays the following fields and buttons:

- **# Interrupted** displays the number of customers who will be interrupted (Isolated and Restored) by the operations performed in this switching sheet.
- **# Isolated** displays the number of customers who will be isolated by the operations performed in this switching sheet.
- **# Restored** displays number of customers who will be restored by the operations performed in this switching sheet.
- **Name** displays different values depending on the type of row being displayed. There are three levels of information in the list:
  - **Impact Date** (level 1) displays the date the customers will be impacted. If the customers are not impacted by the switching steps in this switching sheet, but are being restored, then this date will be the start date of the switching sheet.
  - **Supply Node/Transformer and Restore Date** (level 2) displays the transformer alias the customer is found on within the model, followed by the Restore Date. The Restore Date is based on the Planned Date for the device or, if no Planned Date was specified, the Finish Date of the switching sheet. Isolated transformers display "No Restore Date".
  - **Customer Name** (level 3) displays the customer's name.
- **Account Number** displays the customer's account number.
- **Meter Number** displays the customer's meter number.
- **Critical** displays whether the customer is a critical customer or not.
- **Address** displays the customer's street address.
- **City** displays the customer's city.
- **Zip** displays the customer's zip code.
- **Phone** displays the customer's phone number.
- **Result** displays the result of the impact, such as Restored or Interrupted.

### Buttons

- The  **Rebuild the Impacted Customer List** button regenerates the list based on the most current information in the switching sheet. Each time you rebuild the list, it is saved to the database. The application uses your Study mode to apply the step actions and to determine the Impacted Customers. Your study model should be set up or reset appropriately before generating the list.

- The  **Reset all Deleted Impacted Customers** button resets all impacted customers that were previously deleted from the list.
- The  **Print Preview** button opens the Report Format dialog, from which the output format can be selected. The output will include the switching sheet header information and the Impacted Customer list.
- The  **Print** button opens the Report Format dialog, from which the output format can be selected. A hard copy of the switching sheet header information and the Impacted Customer list will be generated on the printer you select.
- The  **Focus** button focuses the primary Viewer on the selected device.
- The  **Show Critical Customers** button filters the list to show only critical impacted customers; when toggled off, all impacted customers will again be shown.

## Color Coding

Rows (customers) on the list are color-coded to show the status:

- Green - Restored
- Orange - Isolated
- Red - Deleted
- No background - Interrupted

## Generating the List

To generate the Impacted Customer list, follow these steps:

### Important Note:

Service Alerts for planned events are triggered by the Impacted Customers List. Alerts will not be sent if the Impacted Customers List is not generated.

1. On the Request tab, verify that a Start Date and Finish Date have been entered for the sheet. The system uses these fields to generate the Impacted Customer list and the estimated restoration time for each customer. The start of outage is the Start Date of the switching sheet, and the restoration time is the Finish Date.  
**Note:** If a Planned Date is specified for a particular operation on the Steps tab, then the Planned Date, rather than the sheet's Start and Finish Date, is used to generate the impacted customer list for that operation.
2. Make sure that you have added all necessary steps to the switching sheet, and that the sheet is ready to be worked. The steps do not need to be completed to produce the list.
3. On the Steps tab, click the **Reset Study Session** button on the toolbar, then select **Real-Time** or **Nominal**. At this point, you can update your study session within the Study Viewer to depict what the model will be like when the work is carried out.
4. On the Impacted Customers tab, click the **Rebuild Impacted Customer List** button on the toolbar. The list is generated and displayed.

## Deleting and Restoring Customers from the List

To remove a customer from the list, right-click the customer and select **Delete** from the options menu. The row is highlighted in red.

**Note:** Removing the customer from the list does not remove the customer from the model; it simply marks the customer as deleted from the list. If you regenerate the list, the customer will still be marked as deleted. If the customer is impacted multiple times, then that customer will be marked as deleted in each of the lists.

To restore (un-delete) a customer, right-click the customer and select **Undelete** from the options menu.

To restore all previously deleted customers, click the **Reset all Deleted Impacted Customers** button. All red highlighting is removed.

## Moving Customers

If you realize that a customer has been incorrectly associated with a device, you may need to move a customer from a device that will be impacted to a device that will not be impacted. To move customers from their current device to another device, complete these steps:

1. On the Impacted Customers tab, select the row for the customer you want to move.

**Note:** You can only move one customer at a time.

2. Right-click and select **Move Customer...** from the options menu. The Move Customer dialog box opens, displaying the customer name, address, and their original device.
3. Click on the new device in the Viewer. The New Device field on the Move Customer dialog is populated with the selected device.
4. Click **OK**. The system determines whether or not the new device is also an impacted device.

If the new device is not an impacted device, the customer is moved to the new device and is removed from the impacted customer list.

If the new device is an impacted device, a confirmation dialog box is displayed. Do one of the following:

- Click **Yes** to continue with the move. The customer is moved to the new device within the Impacted Customers list. If the selected customer was previously moved to a new device, another confirmation dialog is displayed. Do one of the following:
  - Click **Yes** to continue with the move. The existing customer move record is overwritten.
  - Click **Cancel** to return to the Move Customer dialog so you can select a different device.
  - Click **No** to cancel the move and close both the confirmation dialog and the Move Customer dialog.
- Click **No** to return to the Move Customer dialog so you can select a different device.
- Click **Cancel** to cancel the move and close both the confirmation dialog and the Move Customer dialog.

## Checking for Overlaps

Once you have created steps for a planned event, generated the Impacted Customers list, and saved the switching sheet, you can cross-check the switching sheet with other switching sheets for overlaps of time, control zone, or affected devices.

This allows planners to create a single planned event instead of two separate events and avoid visiting the same location twice or impacting the same customers twice within a short time frame. Planners can identify whether to change the current switching sheet in order to avoid affecting the same customers or same area multiple times in a certain time period.

**Note:** When an overlap occurs, the system does not prevent you from completing planned switching operations, but it does provide a warning indicating the overlap.


If the current plan has a time, control zone, or device overlap with another plan, the Overlap indicator is displayed on the switching sheet **Status Bar**. Use the Overlaps tab to view details about the overlaps.

This section includes the following topics:

- **Using the Overlaps Tab**
- **Color Coding**
- **Updating the Overlaps List**
- **Viewing an Overlapping Switching Sheet**

## Using the Overlaps Tab

The Overlaps tab displays the following fields and buttons:

- The  button updates the Overlaps list based on the current settings.
- The **Range** drop-down allows you to specify how to use the From and To dates. Options are:
  - Sheet Start and Finish Dates
  - +/- 1 day
  - +/- 1 week
  - +/- 1 month
  - +/- 1 year

For example, if you select Sheet Start and Finish Dates, the system updates the From and To dates to match the sheet's Start and Finish dates entered on the Request tab. If you select +/- 1 week, the system displays overlaps that are within one week of the sheet's Start and Finish dates (up to one week prior to or one week after).

- The **From and To** fields specify the range of dates for which you want to view overlaps. These fields are automatically populated based on your selections in the Range field. If you manually enter values in the **From** and **To** fields, those values will override what was auto-populated by the Range selection.
- The **Filter By** drop-down allows you to specify the type of overlaps you want to view: Devices, Control Zones, or Time. See **Updating the Overlaps List** on page 9-50 for details.
- The **Overlaps** table displays a row for each switching sheet that has an overlap with the active switching sheet (and meets the criteria specified above). The blank edit boxes at the top of each column allow you to filter the Overlaps list. See **Viewing an Overlapping Switching Sheet** on page 9-50 for details.
  - The **Sheet #** displays the switching sheet number that contains the overlaps.
  - The **Type** column displays the type of switching sheet.
  - The **# Devices** column displays the number of device overlaps.
  - The **# Zones** column displays the number of overlapping control zones.
  - The **# Hours** column displays the number of hours the sheet overlaps with the current sheet. This value is based on the dates specified in the Start and Finish date fields on each of the switching sheets.
  - The **# Supply Nodes** column displays the number of impacted nodes shared by the two switching sheets.
  - The **User** column displays the user ID of the requestor of the switching sheet.
  - The **Start Date** column displays the start date of the switching sheet.
  - The **Finish Date** column displays the finish date of the switching sheet.

The list on the Overlaps tab supports **Quick Sorting** and **Dynamic Filtering**.

## Color Coding


Rows on the Overlaps tab are color coded to indicate the type of overlap:

- **Gray:** the switching sheets have an overlap, but the overlapping times on the sheets are in the past.
- **Red:** The switching sheets have device overlaps.
- **Orange:** The switching sheets have control zone overlaps.
- **White:** The switching sheets overlap in time only.

## Updating the Overlaps List

Use the fields at the top of the Overlaps tab to re-generate the Overlaps list for a different time period or to show different types of overlaps.

To update the Overlaps List:

1. Use the **Range** and **From/To** dates (for device and control zone overlaps) to specify the time period for which to display overlaps.
2. From the **Filter By** drop-down, select the type of overlaps you want to list. For example, if you want to show only switching sheets that have device overlaps within a specified date range, select **Devices** from the drop-down.
3. Click the  **Update** button to refresh the list based on your selections.
4. Standard filtering and sorting options are available for the results list. See

## Viewing an Overlapping Switching Sheet

To view an overlapping switching sheet, double-click on the entry within the Overlaps List. The switching sheet opens in a new tab. Alternatively, you can right-click on the entry and select **Open Switching Sheet** from the options menu.

## Saving and Loading View Areas

While working with a switching sheet, you may often want to return to the same area of the map. Web Switching Management allows you to save an area of the map, called a view area, so that it can be loaded again later. This allows you to quickly focus the Viewer on a particular section of the model.

You can save multiple view areas for each Viewer. You can assign a description to each view area that identifies its contents and purpose. You can also select a saved view area to be loaded automatically into a Viewer when the switching sheet is opened.







This section includes the following topics:

- **Using the View Areas Tab**
- **Saving a Viewing Area**
- **Loading a Saved Viewing Area**
- **Reloading all Auto-Load Viewing Areas**
- **Deleting a Saved Viewing Area**

## Using the View Areas Tab



Use the View Areas tab to save and load view areas. The first row in the View Areas table contains a special *Dynamic View* (i.e., All Devices) that contains all devices associated with the switching sheet; as devices are added in steps, the dynamic view is automatically updated to include those devices.

The View Areas tab displays the following fields and buttons:

- The **Auto-Load in Viewer** drop-down allows you to assign a View Area to a Viewer, which will then load that view whenever the sheet has focus. Note that the auto-load function does not open the Viewer so you must start the Viewer to see the View Areas.
- **Description** is the description of the saved viewing area. The default description is “View Area #,” where “#” is a uniquely generated ID number. You can change this description up until the associated switching sheet has reached the Completed state. The All Devices (Dynamic View) description is not editable.
- The  toolbar button allows you to save the map area that is currently displayed in Viewer 1.
- The  toolbar button allows you to save the map area that is currently displayed in Viewer 2.
- The  toolbar button allows you to load the selected viewing area to Viewer 1.
- The  toolbar button allows you to load the selected viewing area to Viewer 2.
- The  toolbar button allows you to delete the selected viewing area.
- The  toolbar button allows you to reload all viewing areas marked for auto-loading.

## Saving a Viewing Area

To save a viewing area, complete these steps:

1. In the Viewer window, navigate to the area of the map that you want to save as a viewing area.
2. On the View Areas tab in the Web Switching Management window, click one of the **Save Map** buttons on the toolbar.
  - Click  to save the map area that is currently displayed in Viewer 1.
  - Click  to save the map area that is currently displayed in Viewer 2.

The new view area is added to the bottom of the list of saved views on the View Areas tab.


3. In the Description field, enter a meaningful name that describes the viewing area.
4. If you would like this viewing area to be loaded automatically the next time this switching sheet is opened, select the Viewer from the **Auto Load in Viewer** drop-down.


**Note:** The application will only allow you to select one saved viewing area to be auto-loaded for each Viewer.

## Loading a Saved Viewing Area

After a viewing area has been saved for a switching sheet, you can quickly load the viewing area into the Viewer window.

To load a saved viewing area, complete these steps:


1. On the View Areas tab, select the viewing area you want to load.
2. Click the appropriate button to load the viewing area into the desired Viewer (or use the right-click options menu options):
  - Click  to load the selected viewing area to Viewer 1.

- Click  to load the selected viewing area to Viewer 2.

The selected viewing area is displayed.

**Note:** If the Viewer you selected is not running, a message is displayed.

## Reloading all Auto-Load Viewing Areas

Click  to reload all viewing areas marked for auto-loading. (The Auto Load in Viewer column indicates which viewing areas are specified for auto-loading in each Viewer.)

**Note:** If no Viewers are running, a message is displayed.

## Deleting a Saved Viewing Area

To delete a saved viewing area that you no longer need, complete these steps:

1. On the View Areas tab, select the viewing area you want to delete.
2. Click the **Delete** button (or right-click and select **Delete View Area** from the options menu).  
The viewing area is removed from the list.

## Viewing the Audit Log

The Tracking/Audit Log tab displays the current state of the switching sheet and allows you to transition to a different state. You can provide comments to explain the reason or circumstances around the transition in the Sheet State Tracking panel. See **Changing the Switching Sheet State** on page 9-16 for more information, including valid switching states.

The Audit Log table contains a list of status changes the sheet has gone through since it was created. An entry is added to the log whenever changes occur to the sheet state, including (but not limited to) status changes, sheet ownership changes, generation of the impacted customer list, and sheet version check-ins.

The Audit Log table contains the following fields and buttons:

**Note:** You cannot change any information for existing entries in the audit log table.



- **Entry Date** displays the Date and Time when the change was made.
- **Sheet Version** displays the version of the sheet when the change was made.
- **Sheet State** displays the state of the sheet when the change was made. (See **Switching Sheet States** on page 9-17 for state descriptions.)
- **Entry By** displays the user who initiated the change.
- **Details** displays a brief description of the audit entry.

**Note:** You cannot change any information for existing entries in the audit log table.

As with other list displays, you can click and drag column headers to rearrange the order of columns. You can also resort the list by clicking on the Entry Date column header. By default, log entries are displayed in ascending chronological order.

## Adding a Comment to the Audit Log

The Comment section of the Audit Log panel allows you to add a comment to the log.


1. Click in the Comment field and enter a comment. The **Add** button () will be enabled.
2. Click  to add the comment to the log.



## Emailing Switching Sheet Data

At any time during the process of editing or viewing a switching sheet, you can email the switching sheet data to one or more recipients. The switching sheet data will be sent as an email attachment in a chosen file format.

**Note:** Your email client will be used for sending the email. Depending on your email client, some attachment behavior may be different than described. If you do not have an email client installed and set up on the PC from which you are running Web Switching Management, you will not be able to email switching sheet data.

1. Click the  **Email...** button on the toolbar.
2. From the **Switching Report - Content Selection** dialog, check the box for each section you want included in the email data:
  - Request
  - Events and Crews
  - Switching Steps
  - Impacted Customer List
  - External Documents
  - Safety Documents
  - Audit Log
3. Choose the email format: PDF, RTF, HTML, or XML.
4. Click **OK**.
  - The Subject field is automatically populated; you can edit this field if you wish.
  - The selected data is attached to the email.

**Note:** depending on your configuration, you may be given the option to name the switching sheet data attachment prior to the file's attachment; the standard configuration will always name the file according to the sheet type and number (e.g., Planned\_1003.pdf).

5. (Optional) Enter any text you want to include with the message.
6. **Send** the message according to your email client's functionality.

### Automatic Emails

Based on your system's configuration, emails can be automatically sent to an individual recipient or group and to the requesting user. Automatic emails are normally initiated after a switching sheet state change. For example, if a plan is rejected, the requesting user will be sent an email message indicating that the request was rejected and the reason for the rejection.

## Adding External Documents to a Switching Sheet





Use the External Documents tab to attach documents to the switching sheet. These documents may be images, such as .jpg or .bmp files, Word docs, Excel spreadsheets, or any other supplemental documents. These documents are stored in the database, so shared file systems are not needed.

This section includes the following topics:

- **Using the External Documents Tab**
- **Adding an External Document**
- **Removing an External Document**
- **Saving an External Document to Another Location**
- **Opening and Editing an External Document**
- **Troubleshooting Issues with External Documents**


### Using the External Documents Tab

The External Documents tab displays the following fields and buttons:

- **Name** is the name of the external file. This field cannot be changed.
- **Length** is the number of bytes in the file. This field cannot be changed.
- **Modified Date** is the date the file was last modified or saved. This field cannot be changed.
- **Description** is a user-defined description. You can enter up to 4000 characters in this field.
- **Status** is the status of the document. When you initially add an external document, its status is New; when you save the sheet, its status is cleared. If you delete an external document, its status is set to Deleted until you save the sheet. If you load and modify the document from this tab, then its status is set to Modified.
- The  **Add** button allows you to add an external document. See **Adding an External Document** on page 9-55. (See the next section for details.)
- The  **Delete** button deletes the selected external document(s). See **Removing an External Document** on page 9-55.
- The  **Open** button allows you to open the selected document. See **Opening and Editing an External Document** on page 9-56.
- The  **Save Document to Directory** button allows you to save a copy of the selected document to a directory of your choice. See **Saving an External Document to Another Location** on page 9-55.


## Adding an External Document

To add an external document to the active switching sheet:

1. Click the **External Documents** tab.
2. From the toolbar, click .
3. From the Select Files window, select the files you want to add to the sheet and click **Select Files**. The External Documents tab displays the selected files in green. This indicates that the files have been selected, but have not yet been saved.
4. In the **Description** field, type a description of each file that will convey its contents and purpose.
5. Click the **Save Sheet** button to save the selected documents to the database. The documents are no longer displayed in green, indicating that the documents have been saved.

## Removing an External Document

To remove an external document from a switching sheet, do one of the following:

1. Click the **External Documents** tab.
2. Select the document in the table.
3. Click .

**Note:** alternatively, right-click the document and choose **Delete** from the options menu.

The status of the selected document is set to Deleted, and the file is displayed in red.

4. Click the **Save Sheet** button to save your changes. The document list is updated and the file is removed from the database.

**Note:** The file is deleted from the database, but the local copy of the file on your PC is not removed.

## Saving an External Document to Another Location

When you add a document to the external documents list, the system saves the document to the database. If you want to save a *copy* of the current version of the document on your PC, follow these steps:

1. From the **External Documents** tab, select the document and click the **Save a copy to a directory...** button (or right-click and select **Save As**). The **Save to** dialog is displayed.
2. Browse to the directory where you wish to save the copy.

**Note:** Do not specify a file name. The file is saved to the specified directory using the original file name.

Click **Save to**. A copy of the current database version of the document is saved to the specified directory.

## Opening and Editing an External Document

External Documents may be opened for inspection or to edit depending on the state of the switching plan. If the plan is unlocked (see **Locking and Unlocking a Switching Sheet** on page 9-7), the document will be opened in Read Only mode; if the plan is locked, the document will be opened with Write permissions.

### Opening an External Document

To open an external document:

1. Click the **External Documents** tab.
2. Select the document you want to open and click the **Open** button (or right-click the document and select **Open**). The file is extracted to a local temporary directory and opened in the application associated with the file extension.

**Notes:** If the file extension, or type, is unknown or the application is not available, a message will be displayed indicating that the application is unknown.

### Editing an External Document

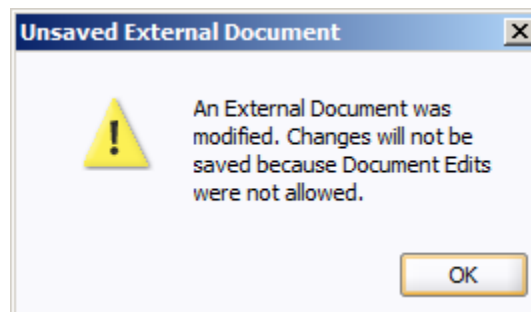
If the file was opened from a locked sheet, it will be available to edit.

1. Make changes to the document as necessary.
2. Save and *close* the document; the database will be updated with the changes made in the extracted (temporary) document.

## Troubleshooting Issues with External Documents

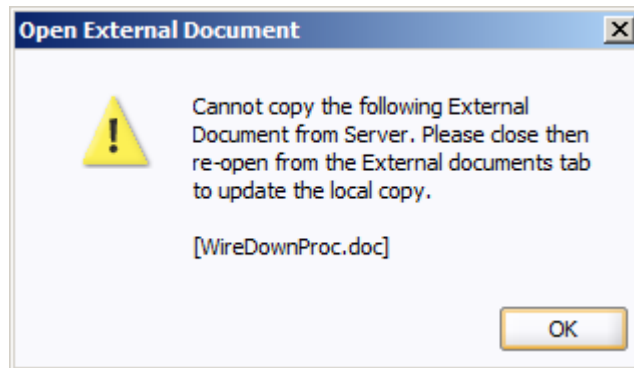
It is best to close the document after it has been edited and saved due to conflicts that can occur if the local file is saved outside of the control of Switching Management.

When the switching sheet opens, the database attempts to extract the external document to the temporary folder and compares the date stamp of its version to the local copy. If the file in the temp directory is newer than the database version, it gives a warning that changes to the local file will not be saved (because the plan was unlocked):



Once you click **OK**, the database will overwrite the local changes with the saved version of the external document in the database.

If the extracted document is still open when the database attempts to restore the saved version, a file lock conflict will result in another warning to inform you that the system cannot extract the database version of the document to the temporary folder and request that you take action to remove the conflict:



To remove the conflict, perform the following steps:

- On the warning dialog, click **OK**.
- Close the external document.
- In the switching plan window, click any tab other than External Documents (*e.g.*, Steps), and then click the External Document tab again. The system will extract the database version of the external document to the temporary directory.

## Copying a Switching Sheet

You can create a new switch plan that includes all of the steps in the open switching sheet by using the **Copy As** function. To copy an open switching sheet, do the following:

1. Select **Copy As...** from the Switching Sheet's File menu to open the **Copy Switching Sheet As** dialog.
2. Select the new switching sheet's type:
  - Planned
  - Emergency
  - Template
  - Outage Correction
3. Click **Create a Copy** to create the new switching sheet.

**Note:** The switching sheet type will determine how the new sheet opens (*e.g.*, recording on or off, which tab is visible, etc.).

## Deleting a Switching Sheet

You can mark a switching sheet as deleted if it is no longer being used. Deleted sheets are retained by the system and can be loaded in View-Only mode when hard-associated to a canceled event. Web Switching Management does not support full deletions of switching sheets from the database. A record of all activity for a switching sheet is always retained in the database.

Note the following rules regarding deleted switching sheets:

- The Delete option is only available for planned, template, outage correction, and emergency sheets that do not contain any real-time instructed or completed steps or any event associations other than canceled and manual events.
- You cannot delete a switching sheet once it has been scheduled. If you need to delete the sheet, you must Cancel it first.
- You cannot delete an outage correction sheet that has an event association.
- Deleted sheets do not appear in the Device to Sheet operation list. (This list is displayed from the Control Tool.)
- Safety documents associated with a deleted sheet do not appear in the Device to Safety Document list. (This list is displayed from the Control Tool.)
- The Impacted Customer lists and External Document lists are cleared for deleted sheets.
- Deleted sheets are ignored by the Model Verify functionality.

To delete a switching sheet, follow these steps:

1. Click the Tracking/Audit Log tab.
2. Enter the reasons for the deletion in the Reason field to the right of the grayed Delete button. (The Delete button is not enabled until you enter text in the Reason field.)
3. Click the **Delete** button.

# Emergency Switching

Emergency Switching includes any unplanned switching operations that occur due to events during storms, equipment failures, or even planned switching actions that fail or are incorrect. Unlike planned switching where the switching sheet is created and studied before it is issued, in emergency switching the switching sheet is created as the operations take place in real-time. Essentially, a switching sheet is created and implemented simultaneously. Steps are recorded on the Steps tab as the Control Tool actions are being performed, and each step is considered complete as it is being recorded.

Emergency switching operates just like planned switching, except that the Web Switching Management window and Viewer must both be in real-time mode. Whenever switching steps are recorded in a switching sheet using the real-time Control Tool, the operation is considered emergency switching. The switching sheet provides a record of the switching operation.

This section includes the following topics:

- **Creating an Emergency Switching Sheet**
- **Recording Emergency Operations**

## Creating an Emergency Switching Sheet

Emergency switching sheets are typically created from the Work Agenda or Event Details window. When you create an emergency sheet from either of these applications, the sheet is automatically associated to the event and saved to the database. The associated actions pertaining to the event, including the Open step operation, will be included in the new sheet. The sheet cannot be deleted and will always remain associated to the originating event.

To create an emergency switching sheet, do one of the following:

- With an event selected in the Work Agenda, select **Switching...** from the Actions menu.
- From the Event Details Window, select **Switching...** from the Actions menu.

## Open or Create New Switching Sheet

The **Open or Create New Switching Sheet** dialog will open with the options of creating a new Emergency or Outage Correction switching sheet (from the Switching Sheet Types pane) or opening an existing switching sheet that is associated to the event from the Pre-Created Switching Sheets pane.

### Create New Sheet

1. Select the Emergency template from the Switching Sheet Types pane. The **Create a Copy** button is enabled.
2. Click the **Create a Copy** button.
3. The Web Switching Management window displays the new emergency sheet.

### Open an Existing Sheet

1. Select an existing sheet from the Pre-Created Switching Sheets list. The **Open** button is enabled.
2. Click the **Open** button.
3. The Web Switching Management window will load the selected switching sheet.

### Alternative Method of Creating an Emergency Switching Sheet

- From the Web Workspace with Web Switching Management File menu, select **New>Switching Sheet...** to display the New Switching Sheet window. Select **Emergency** as the sheet type and click **Create**.

**Note:** an emergency switching sheet created this way will not be associated with an event.

### Recording Emergency Operations

The new emergency sheet is automatically populated with Start and Finish dates. The Start date is the current date/time; the Finish date is defined as the Start date plus a predefined standard event duration.

**Note:** The duration is set to four hours in the product environment.

The sheet opens with the Steps tab active, real-time mode enabled, and recording on. If the Viewer is open, it transitions to real-time mode also. You can begin recording steps as described in the next section..

To record emergency switching operations, complete these steps:

1. Start a new emergency sheet as described in the previous section.
2. Create the steps by selecting devices in the Viewer window and selecting operations from the Control Tool. The process of adding recorded steps for emergency sheets is the same as for planned sheets in real-time mode. See **Adding Recorded Steps to a Switching Sheet** on page 9-28 for details.

Once an action is completed in the Control Tool, the following occurs:

- The status of the recorded step is set to Completed.
  - The Executed By field is populated with your user ID.
  - The Completed Date field is populated with the date and time shown on the Control Tool.
  - Instructed actions use the date/time specified from the Control Tool to populate the Instructed Date field.
  - Any outages created by completing steps from the Control Tool or from Web Switching Management are classified as Real Outages and not Planned Outages.
3. When you have completed all emergency steps, click the **Tracking/Audit Log** tab and set the sheet state to *Completed* by clicking the **Complete** button. The **Confirm State Transition** dialog will open; click **Yes** to confirm the completion or click **No** to close the dialog without completing the sheet. The Finish Date may be updated, if necessary.
    - *Optional:* add a comment in the text field to the right of the **Complete** button.

**Note:** Changes can no longer be made to the completed sheet.



## Event Associations

Event associations are used to associate events to switching sheets. Associated events are displayed in the Events List on the Steps tab header. (See **Events List** on page 9-26.)

Events can be associated to switching sheets in two ways:

- **Hard Associations** are automatic associations that are normally made as you perform actions within Web Switching Management or perform actions from the Control Tool that are recorded into the switching sheet. An event can only have one hard association to a switching sheet. Hard associations cannot be broken once the association has been established; however, the association can be moved to a new switching sheet if the steps that created the event are moved.
- **Soft Associations** are associations that are normally added manually from the **Events List** in Web Switching Management. An event can be softly associated to an unlimited number of switching sheets. This type of association can be manually removed up until the associated switching sheet has reached the Completed state.

**Note:** Event associations do not occur when the event causing action is recorded into the Miscellaneous Log.

## Hard Associations

Hard associations can also be further classified by type. There are four types of hard association relation types:

- **Master** is the relationship type made between a Planned switching sheet and its active master switching job. There can only be one Master Event associated to any single switching sheet.
- **Canceled** is the relationship type made between a Planned switching sheet and a canceled master switching job. There can be any number of Canceled event associations to a single switching sheet. These Canceled events were originally classified as Master Events for the plan.
- **Planned** is the relationship type made between a Planned switching sheet and a planned outage. A planned outage is an outage that was generated from a planned switching sheet after the completion of an action recorded in the Steps section of the plan.
- **Forced** is the relationship type made between an Emergency switching sheet and an unplanned outage or non-outage event. A Forced relationship will be made when recording real-time actions into an Emergency switching sheet. The relationship can also be made when creating an Emergency plan for an event from the Work Agenda Jobs List or the events Event Details display.

## Soft Associations

Soft associations only have one classification type:

- **Manual** is the relationship type made between a switching sheet and a manually associated event. Manual associations are also made between plans if an outage is hard associated to one plan and the outage is restored with another switching sheet. The plan that recorded the restoration step will have the event automatically associated to it with a classification type of Manual. Grouped events can also cause switching sheets to be manually associated. Partially restoring an outage or adding customers to an outage will create a manual association between the switching sheet and the job if no association (hard or soft) already exists.

## Rules for Grouping Event Associations

When resolving outages in the network, it is common for events to be grouped together. When events are grouped, the associations will adhere to the following set of rules:

- If an event with no hard association consumes another event with no hard association, then the resulting event will have no hard association, and its manual associations will be a combined list of both events' manual associations.
- If an event with a hard association consumes an event with no hard association, then the resulting event will have the surviving event's hard association and a combined list of both events' manual associations.
- If an event with no hard association consumes an event with a hard association, then the resulting event will have the consumed event's hard association and a combined list of both events' manual associations.
- If an event with a hard association consumes another event with a hard association, then the resulting event will have the surviving event's hard association. The consumed event's hard association will be listed as a manual association along with the combined list of both events' manual associations.
- If an event consumes another event with an association to the same switching sheet, then the above rules will apply, but the plan will only be listed once in the event's association list. An event can only have one association to a specific switching sheet.

# Working with Safety Documents

NMS Safety Documents, which are an electronic representation of paper safety documents used for switching operations, provide information about a particular operation and record the issuance and release of tags on devices. For switching operations, safety tags are first physically placed on devices, and then the safety document is issued; note that the safety tag must match the safety document type (*e.g.*, Hold tags are used with Hold safety documents). Issuing the safety document effectively gives the crew permission to begin work. When the work is completed, the safety document is released, warning the crew that they must stay clear. Once the safety document is released, safety tags may be removed from the devices and the switches may then be closed.

This section includes the following topics:

- **Understanding Safety Document Types**
- **Mapping Step Types to Safety Document Types**
- **Using Safety Documents in Switching Plans**
- **Opening Existing Safety Documents**
- **Completing Safety Documents**
- **Aborting Safety Documents**

## Understanding Safety Document Types

A utility often has pre-defined safety documents established in its safety policy. While utilities often have specific names for these safety documents, Oracle Utilities Network Management System Web Switching Management has five types of safety documents that a utility can use to represent their established safety documents. This section describes five common safety document types:

- **Clearance** - indicates that clearance for work on a device or in an area has been obtained from the proper authority. The proper authority might be a control center supervisor or a regional dispatcher. Clearance documents imply that the device or area that requires work has been made safe to work on or in.
- **Hold** - indicates that the tagged device(s) should not be operated (*e.g.*, if the device is open, it should remain open). Hold safety documents are used when the device is to be held open or closed in order to complete work in an area of the distribution system. The purpose of the Hold safety document is to protect crew members and prevent injury to human life. Hold safety documents are placed and removed by individuals who have authority over a specific area or operation and serve to restrict the operation of a device.
- **Hot** - indicates that hot line work is being performed (*e.g.*, live wires), and if the tagged device(s) is opened, it should not be closed again until the safety document is released. When Hot Line safety documents are present, device operations in the area should be performed with caution.
- **Information Note** - provides some pertinent information about the device(s). Information Note safety documents are for informational purposes only. These safety documents do not restrict operation of the device, but provide information that a crew member or utility employee should be aware of when working on the device(s).
- **Warning Tag** - provides warning information about the tagged device(s). Like Information Note safety documents, Warning Tags are for informational purposes only. These safety documents do not restrict operation of the device(s), but provide information that a crew member or utility employee should be aware of when working on the tagged device(s).

While safety document names and features may vary, understanding these five types will help you understand the general use of most safety documents. Crews typically “own” safety documents and must authorize their release when they are finished working in an area or on a device.

## Mapping Step Types to Safety Document Types




Safety document types are associated with certain types of steps. These step-to-safety document mappings are configurable. The following list shows what types of steps each safety document type is pre-configured to accept.

- **Clearance:**
  - Place Clearance Tag
  - Remove Clearance Tag
  - Place Ground
  - Remove Ground
- **Hold:**
  - Place Hold Tag
  - Remove Hold Tag
  - Place Ground
  - Remove Ground
- **Hot:**
  - Place HOT Tag
  - Remove HOT Tag
  - Place Ground
  - Remove Ground
- **Informational Note:**
  - Place INFO Tag
  - Remove INFO Tag
- **Warning Tag:**
  - Place WARN Tag
  - Remove WARN Tag

## Using Safety Documents in Switching Plans


### Creating Safety Documents

The Switching Sheet Safety Documents tab displays a list of all safety documents associated with a switching sheet. The Safety Documents tab displays the following fields and buttons:

- **Type** displays the type of safety document. The five types (Hold, Clearance, Hot, Information Note, and Warning tag) are described in the previous section.
- **Doc #** displays the safety document number.
- **Status** displays the status of the safety document. Valid statuses are New, Issued, Released, Unissued, and Completed.
- **Crew** displays the crew assigned to this safety document.
- **Description** displays a description of the safety document.
- The  button refreshes the safety document list.
- The  **Open** button opens the selected safety document. (Alternatively, you can double-click the document in the list.)
- The  **Delete** button deletes the selected safety document. Safety documents can only be deleted if there are no steps associated to the document. Deleted safety documents are not removed from the database.

### Adding Safety State Transition Steps

Each safety state transition step performs a single action, such as issuing or releasing a safety document. To add safety state transition steps, do the following:

1. On the Steps tab, select the steps to which you want the safety document associated. For instance, select Hold Tag steps and Grounding steps to create Hold safety documents. These steps then define the isolation and grounding points for the safety document.
2. Click the  **Create Safety Document** toolbar button. If the selected steps map to multiple types of safety documents, the Select Safety Type dialog prompts you to select the document type. For example, if you select only Grounding steps, then the Select Safety Type dialog allows you to choose Clearance, Hold, or Hot as the safety document type.

#### Notes:

- If the selected step is blank or is associated to an operation for which no safety document is required, the system displays a message indicating that the selected step is not valid for a safety document. Click **OK** to dismiss the dialog.
  - When a step is not selected prior to creating a safety document, the Select Safety Type dialog will be displayed; the new document will not be associated to any switching steps. This can be used to create documents for devices that are not modeled in the system; the unmodeled device ID must be added to the **Other Devices** field to issue the document.
3. Select the safety document type, and click **OK**. The safety document dialog is displayed. (See the following section for field descriptions.)
  4. Enter a comment within the Description field on the safety document dialog, and click **Save** to save the comment.
  5. Validate that step recording is still turned on in the Steps tab.

6. Click the **Issue** button on the safety document dialog. A new safety state transition step is recorded into the switching sheet steps list. The Operation column of the step indicates the type of operation being performed.

**Note:** Conditions associated to the devices in the Tag Points and Grounds lists have to be on the devices for the document to be issued. If the conditions are not on the devices, an error dialog will be displayed. This is mode specific, so when in study mode, the conditions have to be on the devices in your study session. Conditions are not required when only the Other Devices field is filled out.

When recording the safety state transition steps in Real-Time, the safety document must have an assigned crew before it can be issued. This is not a requirement when in Study mode.

7. Select the **Release** and **Complete** buttons on the safety document. New safety state transition steps are recorded into the Steps list for the Release and Complete operations.
8. Close the safety document.

**Note:** If you changed the Other Devices or Description field, you will be asked to save the changes. All other fields are automatically saved within the associated switching steps.

For instructions on executing safety state transition steps, see **Executing Safety State Transition Steps** on page 9-69.

## Safety Document Dialog Overview

### Safety Document Fields

The safety document dialog displays the following fields:













- **Tag Points** display the device(s) and their phases that the safety document is associated with.
- **Grounds** displays the device(s) and their phases that the safety document will protect and validate the grounds on.
- **Other Devices** is a text field that allows you to enter a list of non-modeled devices.

**Note:** An entry is required in at least one of these fields: Grounds, Tag Points, or the Other Devices.

- **Feeder** displays the value found in the Feeder field of the originating switching sheet. To alter this value, you must change the Feeder field on the switching sheet Request tab.
- **Assigned Crew Information** displays the Crew ID of the crew that the safety document has been issued to, as well as the crew's mobile number, pager number, and crew type. The crew ID is auto-populated with the value from the Instructed To field in the safety state transition switching step. A crew is required in this field before an Issue safety state transition step can be completed in real-time.
  - To select a crew to assign to this safety document, click the **Select Crew** icon and then select the desired crew.
  - To delete a crew from this list, click the crew and then click the **Clear Crew** icon.
- **Description** is a text field that allows you to enter notes for the safety document.
- **Audit Log** contains the following information:
  - **Date:** the date and time of each state change and associated device operation.
  - **Description** of the state change or device operation.
  - **Device** associated with the step.
  - **Phases** affected.

- **Issued To:** the crew name or identifier.
- The **Comment** section of the Audit Log panel allows you to add a comment to the log.

### Toolbar Buttons

- The  **Add Device** button allows you to add a new device to a safety document. (To enable this button, select a step on the switching sheet while the safety document is displayed.) The device from the selected step is added.
- The  **Remove Device** button allows you to remove a device from the safety document.
- The  **Object Focus** button focuses the Viewer 1 window on the selected device.
- The  **Issue** button adds a step for issuing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed). This button is enabled when a document is in the New and Released states so the document may be issued and released multiple times.
- The  **Release** button adds a step for releasing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed). This button is only enabled if the safety document has been issued. Selecting this button will cause the Complete button to be enabled.
- The  **Complete** button adds a step for completing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed).
- The  **Abort** button allows you to set the status of the safety document to Aborted. The system prompts you to confirm the action before aborting. This button is only available in real-time mode and only for safety documents that are in the New state.
- The  **Save** button saves your changes to the safety document.
- The  **Print Preview** button allows you to select a report format and then preview the safety document in the selected format.
- The  **Print** button allows you to select a printer and then print a hard copy of the safety document to the selected printer.
- The  **Help** button displays the Safety Document Help.
- The  **Close** button closes the safety document dialog.

## Editing the Device List

### Adding Devices

You can add additional devices to a safety document by doing the following:

1. Open a non-execute version of a safety document. (A non-execute version is loaded from the Safety Lists and the Control Tool. It displays a toolbar at the top of the dialog and no Execute button at the bottom.)

OR

From the associated switching sheet steps list, select the step with the device operation you want added to the safety document. For example, if you select an Add or Remove Tag step, the device is added to the Tag Devices list on the safety document dialog. If you select a Ground step, the device is added to the Ground Devices list.

2. Click the **Add Device** button on the safety document dialog. The new device is added to the appropriate device list.

**Note:** If the selected step is already associated to a safety document, then an error dialog indicates which safety document the step is already associated to.

### Removing Devices

**Note:** Devices can only be removed from a safety document device list if their associated switching step has not been instructed or completed.

You can remove devices from a device list in two ways.


#### Option 1:

1. Open a non-execute version of a safety document. (A non-execute version is loaded from the Safety Lists and the Control Tool. It displays a toolbar at the top of the dialog and no Execute button at the bottom.)
2. Select the device you would like to remove from the device list.
3. Click on the **Remove Device** button. The device is removed from the list.

#### Option 2:

1. From the associated switching sheet steps list, select the step with the device operation that you want removed from the safety document. For instance, if you select an Add or Remove tag step, the device will be removed from the Tag Devices list. If you select a Ground step, the device will be removed from the Ground Devices list.
2. Click the **Unlink From Safety** button on the Steps tab toolbar. The device is removed from the safety document's device list.

### Adding a Comment to the Audit Log

The Comment section of the Audit Log panel allows you to add a comment to the log. Click in the Comment field and enter a comment; click  to add the comment to the Audit Log.



## Executing Safety State Transition Steps

Once a safety state transition step has been recorded, executing (completing) the step causes the Execute Safety Step dialog to be displayed. This dialog looks just like the original safety document dialog except that it has no toolbar and it displays two buttons: Execute and Cancel. Use this dialog to verify that the safety document information is correct, and then click the **Execute** button to execute the step.

When a tag step with an associated safety document is executed, the Control Tool executes placement of the appropriate tag (Hold, Hot, Clearance, etc.) on the device. The symbol on the device indicates that a condition exists on the device, that the area has not been issued to the crew, and thus it is not isolated yet. After the safety document has been issued, the symbol on the device changes to indicate that the tag is under the control of the safety document. For example, if configured in your project, a Hold tag may change to indicate Hold with a small lock symbol next to it. When a tag changes to a locked state, it is no longer possible for the user to remove the tag from the Control Tool. The safety document must be released before the tags can be removed from the Control Tool.

For more information, see one of the following topics:

- **Issuing Safety Documents While Executing Steps**
- **Releasing Safety Documents While Executing Steps**

## Issuing Safety Documents

Safety documents are issued when an Issue safety document switching step is completed and the Execute button is selected on the safety document.

**Note:** The appropriate tag type must be placed on the device prior to the safety document being issued. For example, to issue a Hold document, you must place a Hold tag on the device before the safety document can be issued.

Once a safety document is issued:

- You cannot complete, delete, or reissue the safety document. The Description field is the only field that remains editable.
- The only button option available on the safety document dialog is Release.
- The Viewer displays a symbol on all devices that are specified in the safety document to indicate that the safety document has been issued.

## Issuing Safety Documents Manually

To issue a safety document manually:

1. Open the safety document (if it is not already open) by selecting the document on the Safety Documents tab and clicking the **Open** button.
2. Click the **Issue** button on the open safety document. A symbol appears on all devices in the Viewer that are specified in the safety document to indicate that the safety document has been issued.

**Note:** If you manually Issue a safety document in real-time mode, a safety state transition step is automatically recorded to the Steps list, regardless of whether step recording is turned on. This is the audit of the safety documents transitions.

### Issuing Safety Documents While Executing Steps

To issue a safety document through step execution:

1. From the Steps List, select the Issue safety state transition step and select the **Complete** button. The Execute Safety Step dialog opens, and the Execute and Cancel buttons are enabled.  
  
**Note:** When instructing safety state transition steps in real-time mode, the safety document dialog is not displayed. It is only displayed when the step is completed.
2. Select the **Execute** button. A symbol appears on all devices in the Viewer that are specified in the safety document to indicate that the safety document has been issued. The safety state transition step is also marked as Completed.

### Releasing Safety Documents

Safety documents are released when switching steps associated to a releasing safety document are completed and the Execute button is selected on the safety document. The symbol for the safety document is removed from the device in the Viewer and the original tag symbols are placed back onto the device. Once the document is released, the Description text field remains editable. At this point the Safety Document can either be reissued to a different crew or completed.

### Releasing Safety Documents Manually

To release a safety document manually:

**Note:** The document must already be issued before it can be released.

1. Open the safety document (if it is not already open) by selecting the document on the Safety Documents tab and clicking the **Open** button.
2. Click the **Release** button on the open safety document. The symbol for the safety document is removed from the device in the Viewer and the original tag symbols are placed back onto the device.

**Note:** If you manually release a safety document in real-time mode, a safety state transition step is automatically recorded to the Steps list, regardless of whether step recording is turned on. This is the audit of the safety documents transitions.

### Releasing Safety Documents While Executing Steps

To release a safety document through step execution:

1. From the Steps List, select the Release safety state transition step and select the **Complete** button. The Execute Safety Step dialog opens, and the Execute and Cancel buttons are enabled.  
  
**Note:** When instructing safety state transition steps in real-time mode, the safety document dialog is not displayed. It is only displayed when the step is completed.
2. Select the **Execute** button. The symbol for the safety document is removed from the device(s) in the Viewer and the original tag symbols are placed back onto the device(s). The safety state transition step is also marked as Completed.

## Opening Existing Safety Documents

To open an existing safety document, complete these steps:

### From the File menu:

1. Select **Open>Safety Documents...** from the File menu. The Open Safety Documents window appears.
2. Select the safety document you want to open and click the **Open** button or double-click on the document in the list. The safety document is opened. If the safety document is associated with a switching sheet, the switching sheet will also open.

### From an open switching sheet:

1. Click the Safety Documents tab.
2. Select the safety document you want to open and click the **Open** button or double-click the document in the list. The safety document dialog is displayed.

### From a switching step on the Steps tab:

1. Right-click on one or more steps that have safety document associations, then select **Load Safety Document(s)...** from the options menu. The safety document dialogs are displayed.

**Note:** Steps with associated safety documents display the document type and number displayed in the Operation step column.

### From the Control Tool:

1. For active safety documents, double-click on a device within the Viewer window.
2. From the Control Tool, click the **Safety Document(s)...** button.

If only one safety document is currently active on this device, then the safety document dialog is displayed.

If multiple safety documents are active, the Device to Safety Document List displays a list of safety documents for the device. The list includes only safety documents that are part of an active sheet and documents that were completed in the last 30 days. Select the safety document you want to load from this list. The safety document dialog is displayed along with the associated switching sheet.

## Completing Safety Documents

When you have completed all steps in a switching sheet, you should complete all safety documents associated with the sheet.

To complete a safety document, use either of the following methods:

### Option 1

1. Follow the steps described above to open the safety document.
2. Click the **Complete** button on the safety document dialog.

**Note:** Once completed, the document is locked from further editing. When manually completing a safety document in real-time mode, the action is automatically recorded in the associated switching sheet's Steps list.

3. Repeat these steps for all safety documents associated with the switching sheet.

### Option 2

Record a Complete safety state transition step (as described in the previous sections) and use that step to complete the safety document. Repeat for all safety documents associated with the switching sheet.

## Aborting Safety Documents

If a switching sheet is aborted, you will need to abort any associated safety documents before you can complete the switching sheet.

**Note:** The Abort option is only available in real-time mode when the safety document is in the New state.

To abort a safety document, follow these steps:

1. Click the Safety Documents tab.
2. Double-click the safety document you want to abort.
3. Click the **Abort** button on the toolbar.
4. When prompted, confirm your action.

## Outage Correction

You can also use Web Switching Management for outage correction. After an outage is completed, you can revise the outage restoration sequence and times by re-recording the outage restoration sequence in study mode.

This Outage Correction environment only includes the tools needed to re-record a completed outage in study mode:

- The Work Agenda contains only the Completed List.
- The Viewer cannot enter real-time mode.
- The Web Switching Management window can only display the Outage Correction switching sheet type, and cannot enter real-time mode.

## Re-Recording the Outage Restoration Sequence in Study Mode

To re-record the correct outage restoration sequence, follow these steps:

1. From the Event Details for a completed event, press the **Switching...** button. An Outage Correction switching sheet is created for the event.
2. In the Outage Correction switching sheet, turn recording on.
3. Record the entire set of corrected outage and restoration steps in the Viewer, using the Control Tool's date/time selector to set the correct operation times.
4. Click the **Correct Outage** button on the Steps tab toolbar. A confirmation dialog appears.
5. Press **OK**. The system validates the plan and, if successful, replaces all affected customer data for the related outage and updates the new outage time, customer count, and outage device. The Event Details, when re-loaded, will reflect any partial restoration changes as well.

**Note:** if you are replacing an outage that was involved in a partial restoration scenario, you will need to either update the other related outages as well, or mark them so that they are not reported and calculated in your indices.

## Using the Miscellaneous Log

The Miscellaneous Log automatically records all real-time switching actions that are not recorded in any switching sheet. The miscellaneous log does not need to be open for steps to be recorded; the system automatically detects steps performed in real-time that are not being recorded in a switching sheet. You can use the miscellaneous log rather than creating emergency switching sheets.










This section includes the following topics:

- **Displaying the Miscellaneous Log**
- **Filtering the Log**

### Displaying the Miscellaneous Log

To view the Miscellaneous Log, select **Miscellaneous Log...** from the **Tools** menu. The Miscellaneous Log displays the same columns as a switching sheet Steps tab (except for the Version and Comments columns, which do not appear). See **Steps Tab** on page 9-19 for column descriptions.

The following fields and buttons are displayed at the top of the Miscellaneous Log tab.

- The **From** date picker, **Range** drop-down, and the **All Users** checkbox set the log's filter criteria.
- The **Fetch** button () is used to get records from the database.
- The **Previous** () and **Next** () buttons allow you to view the log entries for the previous or following period. For example, if the number of days drop-down is set to 1 week, then clicking the Previous button displays the previous week's log entries.
- The **Complete** button () completes the selected instructed steps. The status of the step changes to Completed.
- The **Abort** button () sets the status of an instructed step to Aborted. Use this if the step was never attempted.
- The **Fail** button () sets the status of an instructed step to Failed. Use this if the step was attempted but failed.
- The **Focus** button () focuses the Viewer on the selected device.
- The **Cut** button () allows you cut one or more steps from the miscellaneous log. You can then paste the steps into another switching sheet.
- The **Help** button () displays help for the Miscellaneous Log tab.

## Filtering the Log

Use the fields at the top of the Miscellaneous Log tab to filter the list as follows:

1. Select a starting date from the **From** date picker.
2. From the drop-down, select the number of days from that starting date for which you want to see log entries.
3. Check or uncheck the **All Users** checkbox. (When **All Users** is checked, the log shows steps that were executed by all users; when unchecked, the log shows only steps that were executed by you.
4. Use the fields at the top of the tab to filter the log.
5. Click the **Fetch** button to refresh the list based on your entries.

## Viewing Global Overlaps

The Global Overlaps list allows you to identify overlaps of date/time, control zone and affected devices within a specific time period for all active switching sheets.

To display the Global Overlaps list, choose **Switching Overlaps...** from the **Tools** menu.

The fields, buttons, and options on this tab are nearly identical to the Overlaps tab that is displayed for individual switching sheets. See **Using the Overlaps Tab** on page 9-49 for more information.

Click the Help button () to display help for the Global Overlaps tab.

## Web Safety

**Web Safety** provides *Stand Alone Safety Documents* for recording tagging and grounding operations outside of a switching plan. **Web Safety** is not a substitute for safety documents created in switching plans and, therefore, does not support the use of aggregate actions when recording tag points and grounding actions. **Web Safety** limits device associations to those not involved in *Open* and *Close* operations.

### Understanding the Stand Alone Safety Document Window

Stand Alone Safety Documents windows share many features and behaviors of switching sheet windows. Like switching sheets, Stand Alone Safety Documents cannot be moved outside of the confines of the **NMS** workspace. Stand Alone Switching Document windows open in the lower right quadrant of the workspace, but may be moved anywhere within the workspace or maximized to the full workspace dimensions.

Each open safety document has its own tabbed window, which is labeled with a combination of the safety document type and the number. Multiple safety documents and switching sheets are typically docked together and displayed as a tab group. Double-click any tab (or the empty area to the right of the tabs) to maximize the tab group; double-click again to restore the size.

Right-click a tab to access the options menu, which provides the following options:





**Note:** for simplicity the term *sheet* will be used to mean either a stand alone safety document or switching sheet.

- **Maximize:** maximizes the window.
- **Restore:** restores the maximized window to its original size and position.
- **New Tab Group:** displays the sheet separately.
- **Collapse Tab Groups:** regroups separate windows into tab groups.
- **Windows...:** opens a dialog that lists all open sheets, which you can then:
  - Activate (*i.e.*, bring to front in a tab group) a single sheet.
  - Close selected sheets.
- **Close (Ctrl-F4):** closes the sheet.
- **Close All (Ctrl+Shift-F4):** closes all open sheets.
- **Close Others:** closes all open sheets except the sheet that was right-clicked.

## Menu and Toolbar Features

### File Menu









The table below describes the options available on the File menu.

Menu Option	Description	Toolbar Icon
Save [Control-S]	Saves the Safety Document.	
Copy As...	Opens the Safety Document Types dialog that allows you to create a new safety document with the current document's data.	--
Print Preview... (Ctrl-Shift-P)	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for previewing a switching report.	
Print (Ctrl-P)	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for printing a switching report.	
Email...	Opens the Switching Report Content Selection dialog that allows you to choose the criteria for emailing a switching report.	
Exit	Closes the active switching sheet.	--

### Help Menu.







Option	Description	Toolbar Button
Web Safety Help [F1]	Opens online help content for safety documents.	--
About Web Safety	Opens a window with environment and software information.	--

### Toolbar Buttons

- The  Recording On /  Recording Off button shows you the current status of recording and allows you to toggle recording off or on, respectively.
- The  **Add Device** button allows you to add a new device to a safety document.
- The  **Remove Device** button allows you to remove a device from the safety document.
- The  **Object Focus** button focuses the Viewer 1 window on the selected device.
- The  **Place Condition** button is used to apply conditions when the condition actions were recorded in study mode.
- The  **Issue** button adds a step for issuing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed).
- The  **Release** button adds a step for releasing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed).



This button is only enabled if the safety document has been issued. Selecting this button will cause the Complete button to be enabled.

- The  **Complete** button adds a step for completing the selected safety document. The step is added to the end of the steps list or after the step insertion indicator (if one has been placed).
- The  **Abort** button allows you to set the status of the safety document to Aborted. The system prompts you to confirm the action before aborting. This button is only available in real-time mode and only for safety documents that are in the New state.
- The  **Reset Study Session to Real Time or Nominal** allows you reset your study session to either Real Time or Nominal conditions.
- The  **Real Time** button switches the document to real time mode.
- The  **Study Session** button switches the document to study mode.
- The  **Step Actions** button toggles the actions view at the bottom of the safety document. The actions are identical to switching steps found in switching sheets. The actions list includes the tag, ground, and safety state transition actions associated to the document..


## Safety Document Fields

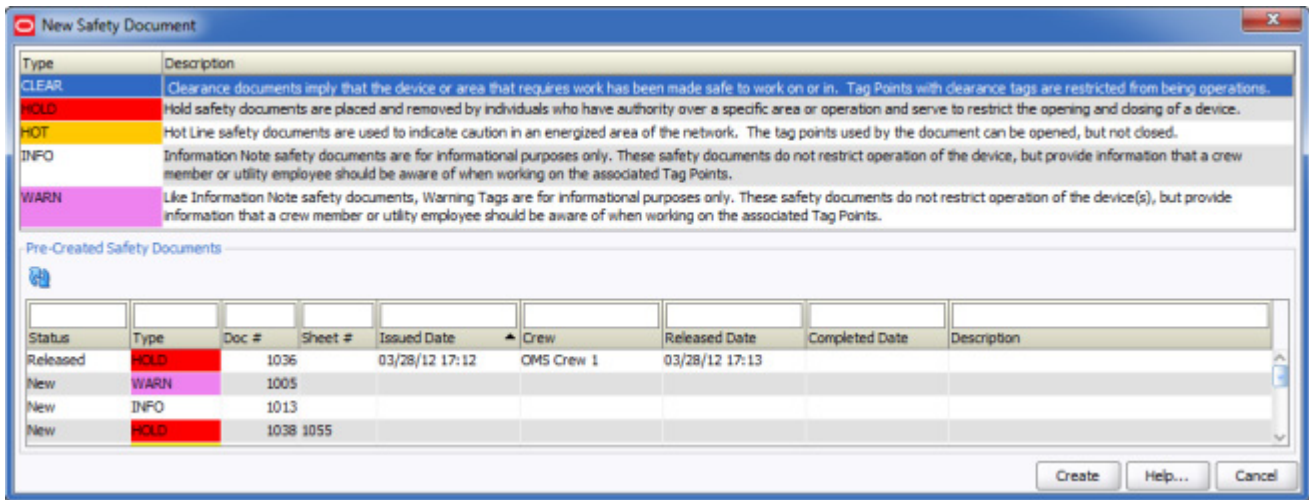
The safety document dialog displays the following fields:

- **Tag Points** display the device(s) and their phases that the safety document is associated with.
- **Grounds** displays the device(s) and their phases that the safety document will protect and validate the grounds on.
- **Other Devices** is a text field that allows you to enter a list of non-modeled devices.
 

**Note:** An entry is required in at least one of these fields: Ground Devices, Tag Points, or the Other Devices.
- **Feeder** field allows you to enter a feeder value.
- **Assigned Crew Information** displays the Crew ID of the crew that the safety document has been issued to, as well as the crew's mobile number, pager number, and crew type. The crew ID is auto-populated with the value from the Instructed To field in the safety state transition switching step. A crew is required in this field before an Issue safety state transition step can be completed.
  - To select a crew to assign to this safety document, click the **Select Crew** icon and then select the desired crew.
  - To delete a crew from this list, click the crew and then click the **Clear Crew** icon.
- **Description** is a text field that allows you to enter notes for the safety document.
- **Audit Log** contains the following information:
  - **Date:** the date and time of each state change and associated device operation.
  - **Description** of the state change or device operation.
  - **Device** associated with the step.
  - **Phases** affected.
  - **Issued To:** the crew name or identifier.
- The **Comment** section of the Audit Log panel allows you to add a comment to the log.
- The **Steps** section contains all of the step actions associated with the safety document.

## Creating a New Stand Alone Safety Document

To create a new Stand Alone Safety Document, select **New>Safety Document...** from the Web Workspace File menu (or click ) to launch the **New Safety Document** window.



The New Safety Document window allows you to create safety documents based on predefined templates; the new safety documents may be blank or populated with data from existing safety documents.

- Safety Document Types table lists the available safety document types.

Type	Description
CLEAR	Clearance documents imply that the device or area that requires work has b
HOLD	Hold safety documents are placed and removed by individuals who have au
HOT	Hot Line safety documents are used to indicate caution in an energized area
INFO	Information Note safety documents are for informational purposes only. The
WARN	Like Information Note safety documents, Warning Tags are for informational
	that a crew member or utility employee should be aware of when working of

- The **Type** column displays the types of safety documents you can create. (Clear, Hold, Hot, Info, and Warn are the base types.)
- The **Description** column displays a description of the safety document type.
- Pre-Created Safety Documents table lists the existing safety documents.
  - **Status** displays the safety document state, such as New, Issued, or Released.
  - **Type** displays the safety document type, such as HOLD, INFO, or CLEAR.
  - **Doc #** displays the safety document ID.
  - **Sheet #** is the number of the switching sheet associated with a safety document; stand alone safety documents do not have an associated sheet.
  - **Issued Date** is the date and time when the document was issued.
  - **Crew** is the crew that was issued the safety document.
  - **Released Date** is the date and time when the document was released.
  - **Completed Date** is the date and time when the document was completed.
  - **Description** is the content of the safety document's description field.

## New Blank Safety Document

To create a blank safety document, do the following:

1. Select a safety document type from the Safety Document Type list.
2. Click **Create**.

## New Safety Document with Existing Safety Document Data

You may want to create a new safety document with data from an existing safety document; for example, creating multiple safety documents types to be used in a multistep switching operation. The Safety Document type is based on the template no matter what safety document is supplying the data.

1. Select a safety document type from the Safety Document Type table.
2. Select an existing safety document from the Pre-Created Safety Documents table.

Type	Description
CLEAR	Clearance documents imply that the device or area that requires work
HOLD	Hold safety documents are placed and removed by individuals who have
HOT	Hot Line safety documents are used to indicate caution in an energized
INFO	Information Note safety documents are for informational purposes only; utility employee should be aware of when working on the associated T
WARN	Like Information Note safety documents, Warning Tags are for informing that a crew member or utility employee should be aware of when work


Pre-Created Safety Documents

Status	Type	Doc #	Sheet #	Issued Date	Crew
Released	HOLD	1036		03/28/12 17:12	OMS Crew 1
New	HOLD	1038 1055			

3. Click **Create a Copy**.

## Using Stand Alone Safety Documents

### Recording Tags and Grounds into a Safety Document

1. Create a stand-alone safety document.
2. In Real Time, initiate a Place Tag operations associated to that document type. For example, Place HOLD for a HOLD document. The devices are displayed in the Tag Points list.
3. Record a Grounding operation. The device used to place the ground is displayed in the Grounds list.
4. Click the **Step Actions** toggle button () and note that the operations are recorded there as well. This is the source list and this list feeds the Device and Ground lists found on the document's main form.

## Remove a Device from a Safety Document List

1. Create a stand-alone safety document.
2. Record some tagging and grounding operations in Real Time.
3. Select one of the devices in the Tag Points list followed by the Remove option. This will remove the device from the Tag Points list.

**Note:** the Remove option is only available when the document is in the New state.

4. Navigate to the Miscellaneous Log. The Miscellaneous Log will have a step associated to the Place Tag operation that was originally recorded into the safety document and later removed.

## Issuing, Releasing, and Completing a Safety Document

1. Create a stand-alone safety document.
2. Record some tagging and grounding operations in Real Time.
3. From the document, assign a crew to the document.
4. Issue the document. The conditions on the viewer will change to indicate that they are under the control of a safety document. This is indicated by displaying an asterisk within the viewer symbol. The status of the document is updated in the status bar, which is found at the bottom of the document. An audit log entry is created for the state transition.
5. Release the document. The conditions on the viewer will change to indicate that they are no longer under the control of the safety document. The status of the document is updated in the status bar, which is found at the bottom of the document. An audit log entry is created for the state transition.
6. From the viewer, remove the tagging and grounding operations while record is active in the safety document. The actions are recorded in the Audit Log of the safety document.
7. Complete the document. The safety document status is updated and unlocked and placed into View Only mode. All the toolbar options are desensitized except for the print, help, close and target options.

## Loading a Safety Document

1. From the Open Safety Document list, load a safety document not associated to a switching sheet. The document should be loaded into the workspace editor.





## Deleting a Safety Document

1. Create a stand-alone safety document.
2. From the document's File menu, select **Delete**. The document will be marked as Deleted and will no longer show up in the Safety Document List. Safety documents can only be deleted when no Real Time tags or Grounds are associated and listed in the Tag Points and Grounds list.


## Copying a Safety Document

1. From the New Safety Document dialog, refresh the pre-created safety document list.
2. Select a pre-created safety document and a target document type
3. Click **Create a Copy**. A new safety document is created. This new document will have the same list of devices as the original document. The Audit Log of the new document will have one entry describing when the document was created.

## Create a Safety Document in Study Mode

1. From the New Safety Document dialog, select a safety document type and click **Create**. The new document is created and by default goes into Real-Time mode.
2. Click .
3. Verify that recording is on.
4. Open the Viewer in Study Mode
5. Add appropriate tags and grounds to devices. As the actions are recorded by the safety document, the devices show up in the Tag Points and Grounds lists.
6. Once all of the tags and grounds have been applied, issue the safety document and release it to test it in Study mode.
7. Reset the study session from the safety document.
8. Select the Tag Points and place the tag points in the model. This can be done by selecting the device and clicking the Place Condition button (.
9. Select the Grounds and place the grounds to the model. This can be done by selecting the device and clicking the Place Condition button (.
10. Click . The Viewer will display the appropriate conditions on the devices.
11. Issue the safety document. The conditions displayed in the Viewer will change to indicate that they are under the control of a safety document. This is indicated by displaying an asterisk within the Viewer symbol. The status of the document is updated in the status bar, which is found at the bottom of the document.

## Associate an Existing Place Tag Action to a Safety Document

1. With no switching sheet or safety document in record mode, find a device that can have a HOLD condition.
2. Double-click the device to launch the Control Tool.
3. Select **Place Hold Tag** from the **Tag...** menu's **Hold Tags** sub-menu. A Hold Tag step is recorded into the Miscellaneous Log.
4. Create a HOLD safety document.
5. Load the Miscellaneous Log and refresh the list so that the Place Hold Tag step is displayed.
6. Select the Place Hold Tag step. Press Control+X to cut the step.
7. Go back to the newly created Hold Safety document and click . The device associated to the Place Hold Tag step is displayed in the safety document's Tag Points list. The safety document can now be issued.

**Note:** If you attempt to add a step action association that is not valid for the safety document type, an error message will be displayed. For example, you would get an error if you attempted to add a step action for a Place Hold Tag into a Clearance document.

# Chapter 10

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## Power Flow, Suggested Switching, and Volt/VAr Optimization

This chapter covers the following topics:

- **Using Power Flow**
- **Using Suggested Switching**
- **Using Volt/VAr Optimization**

### Using Power Flow

The Oracle Utilities Network Management System - Power Flow Extensions enable engineering analysis of the electrical distribution system for use in the operations and control center rather than for design or planning purposes. They assess the equipment loading and feeder voltage profiles for selected portions of the electrical network, and provide overload, fault, and voltage violation information for review.

Power Flow functionality allows you to view the results of the power flow solution, enter and evaluate solution options, and modify execution parameters.

**Note:** Power Flow solutions may be returned as 'Non-Converged' when there are errors in the data model. That section of the network is disabled for Power Flow solutions until the island is re-enabled manually or the model is updated. See **Chapter 11, Feeder Load Management** for more information on feeder status and re-enabling a non-converged island.

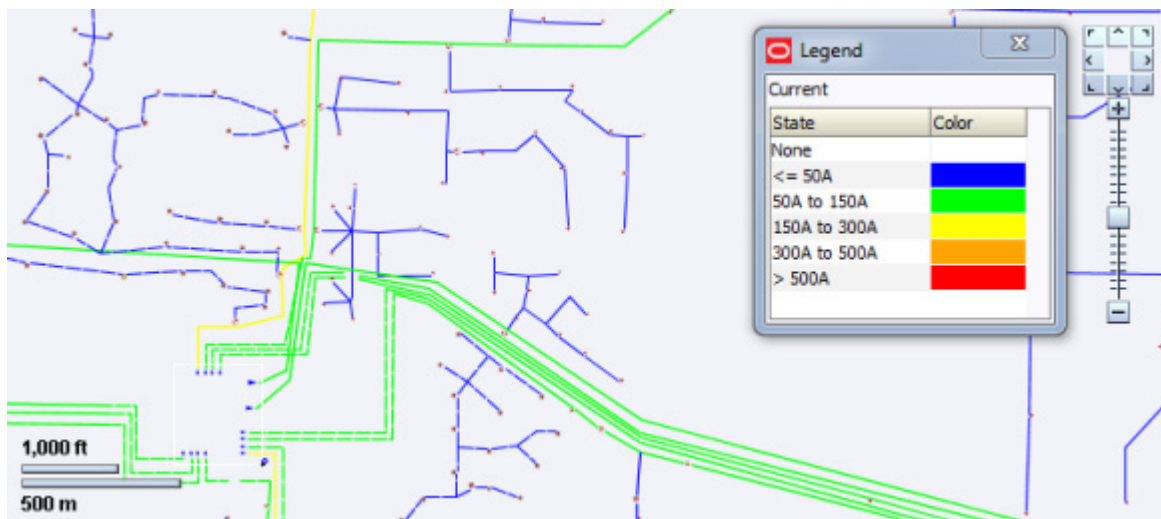
This section includes the following topics:

- **Viewer Power Flow Information Visualization**
- **Real-Time Power Flow Updates**
- **Viewing Power Flow Results in Real Time**
- **Power Flow Real-Time Options**
- **Viewing Power Flow Results in Study Mode**
- **Using Power Flow with Look Ahead**
- **Power Flow Solutions Details for Administrative Users**

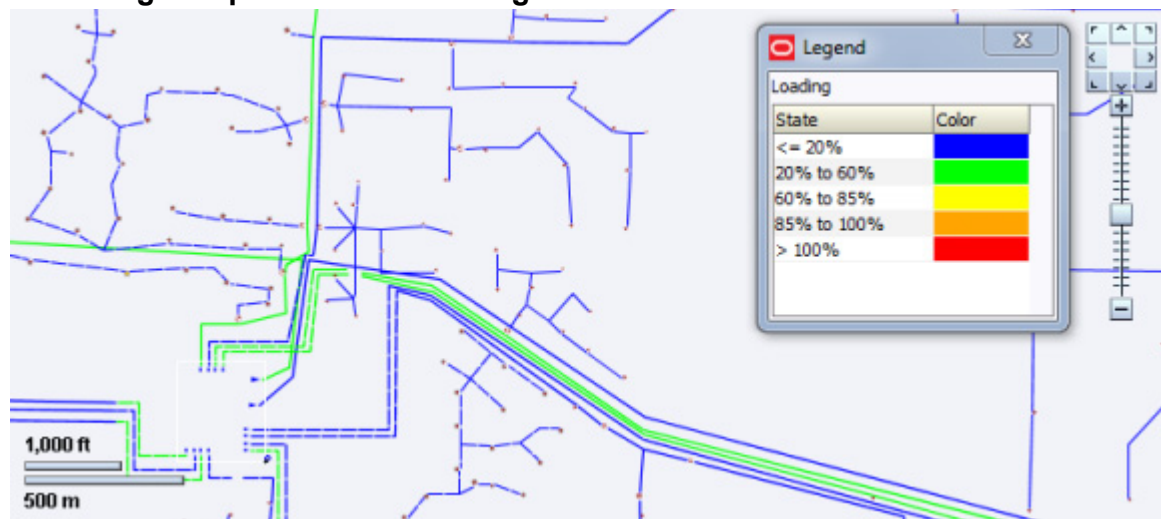
## Viewer Power Flow Information Visualization

In addition to the standard feeder and phase views, the Viewer provides options for visualizing the power flow information. The Viewer Legend, which is opened from the Help menu, displays legend information based on the current view.

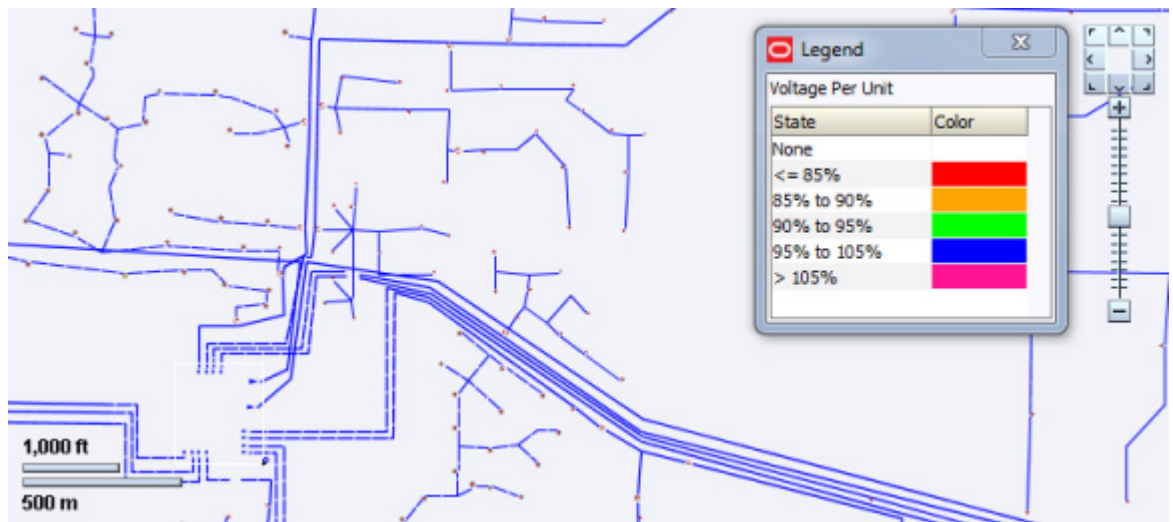
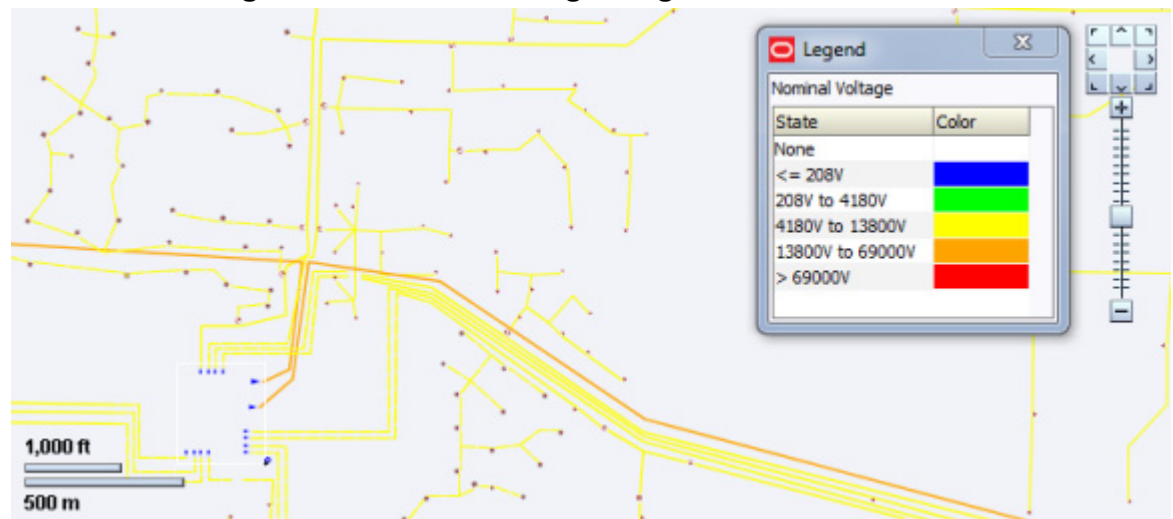
### Currents: the current range.



### Loading: the per unit current range.

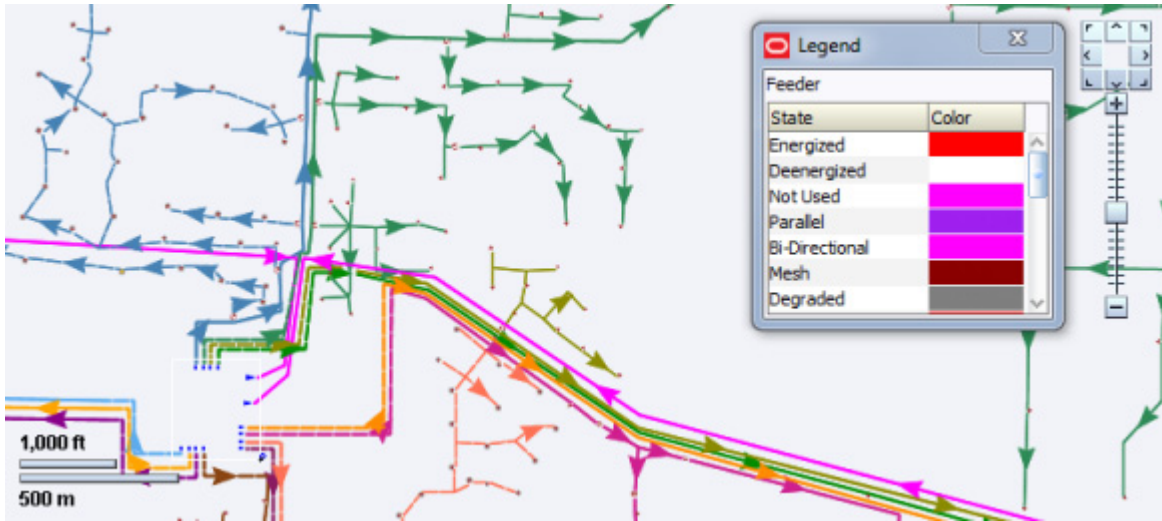




**Voltage Per Unit: the per unit voltage range.****Nominal Voltages: the nominal voltage range.**

## Flow Direction

The viewer will render any of the view options with flow direction by selecting Show Flow Direction from the Options menu (Shift-F). The example below shows Feeder with flow direction enabled.



## Real-Time Power Flow Updates

When a switching operation occurs in the system, it may take a few seconds before analog SCADA measurements update to reflect the new configuration. For this reason, the real-time power flow will not update instantaneously after a topology change, but will wait a configured number of seconds (the default is 30) before a resolve is triggered. By then, it is assumed that the system measurements are again stable. Clicking on the power flow results during the delay will result in a Power Flow Results Pending message being displayed.



**Note:** The delay period is set in the SCADA\_DELAY\_TIME rule. Administrative users can view or change this setting on the Configuration Assistant **Using the Event Management Rules Tab**, in the Power Flow Related Rules category and Feeder Load Management subcategory.

## Viewing Power Flow Results in Real Time

In real-time mode, Power Flow is working all the time, recalculating results dynamically. The Viewer's **Device Details** Power Flow Results tab displays the power flow solution and calculation results for selected objects.

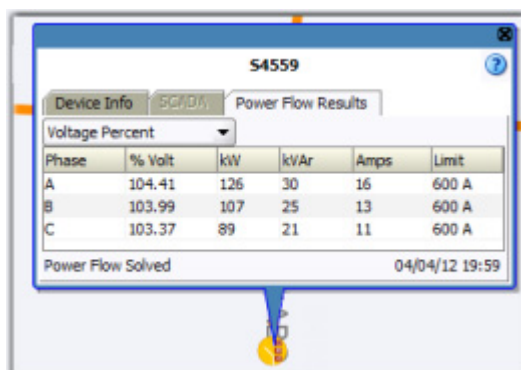
**Note:** see **Displaying Device Details** on page 1-34 for more information on using Device Details in the Viewer.


To view the Power Flow results for a device in real time, follow these steps:

1. Start the Viewer. If the Viewer is in Study Mode, click the  button to set the Mode to Real-Time.
2. Click  to enable Device Details.

- Click the device.

The latest results are displayed on the Power Flow Results tab



**Note:** To view the parameters used in Power Flow Calculations, click the  toolbar button or select **Power Flow Options...** from the Options menu. See **Power Flow Real-Time Options** on page 10-6.

## Device Details: Power Flow Status

Power Flow status messages are provided to better alert you of the quality of the power flow solution being generated. They are displayed at the bottom of the Power Flow Results tab along with the date and time of the latest result.

### Status messages for the NMS product configuration:

- **Power Flow Solution Pending** indicates that the power flow solutions are currently paused due to recent system topology changes and results will not be available until the configured delay has ended.
- **Power Flow Solved** indicates that the power flow calculations have completed successfully and the results are valid.
- **Non-Converged Power Flow Solution** indicates that Power Flow cannot find a stable solution since each iteration of the power flow algorithm yields a changing result.
- **Power Flow Not Solved - Suspect SCADA data** indicates that power flow solution failed to solve successfully due to SCADA data irregularities. See **Chapter 11, Feeder Load Management** for details on identifying SCADA data irregularities.
- **Power Flow Not Solved - Data Model Error** indicates there is an issue with some part of the data model that will not allow a reasonable solution to the power flow calculation.
- **De-energized Device** indicates the selected device is deenergized so there is no solution.

## Power Flow Results Data

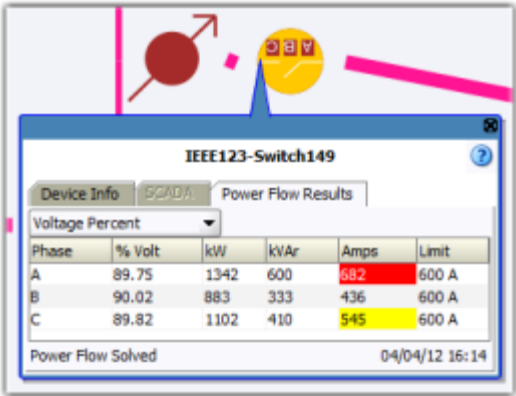
The Device Details Power Flow Results displays power flow solutions in a tabular format. The date and time the last power flow solution was requested for the selected device appears in the bottom right corner of the balloon dialog.

- The **Voltage Display Type** used in the power flow calculation is displayed. You can change this to any of the following:
  - Secondary Base Voltage
  - Nominal Base Voltage
  - Voltage Percent

- The **Phase** column displays the device phase.
- The **kV** column contains calculated voltage in the units selected above.
- The **kW** column contains the calculated voltage in the units selected above.
- The **kVAr** column contains the phase reactive power flow.
- The **Amps** column contains the phase current.
- The **Limit** column contains the phase current limit (in amps).


Data Indicators

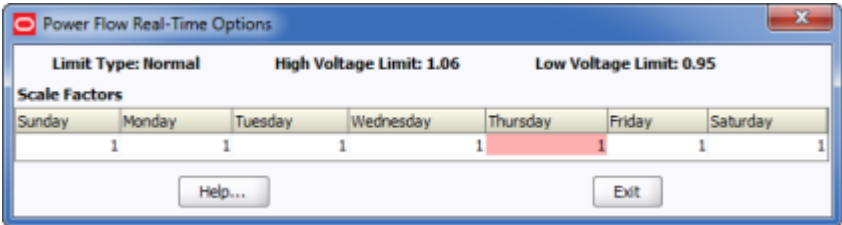
Voltage and current violations are highlighted in red. Voltage and current warnings are highlighted in yellow. Amps for backfeeds are highlighted gray.



Phase	% Volt	kW	kVAr	Amps	Limit
A	89.75	1342	600	582	600 A
B	90.02	883	333	436	600 A
C	89.82	1102	410	545	600 A

Power Flow Real-Time Options

To view the parameters used in Power Flow Calculations, click the  **Power Flow Options** button, which is available from the Viewer or the Feeder Load Management Tool.

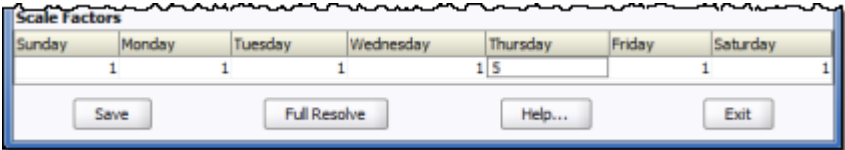


Scale Factors						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	1	1	1	1	1	1

The Power Flow Real-Time Options dialog displays the limit type (emergency or normal) and the high and low limit values. It also displays the load scale factor values for each day. The current day's scale factor displays with a highlighted (pink) background. Non-administrative user types can view, but not edit, the options on this window; click **Exit** to close the window.

Administrative User: Full Resolve



Administrative Users can change the load scale factors, save their changes, and then start a full Feeder Load Management resolve by clicking **Full Resolve**. If you have unsaved changes, the system will prompt you to save. The resolve starts immediately and the window closes.



Scale Factors						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	1	1	1	5	1	1

## Viewing Power Flow Results in Study Mode

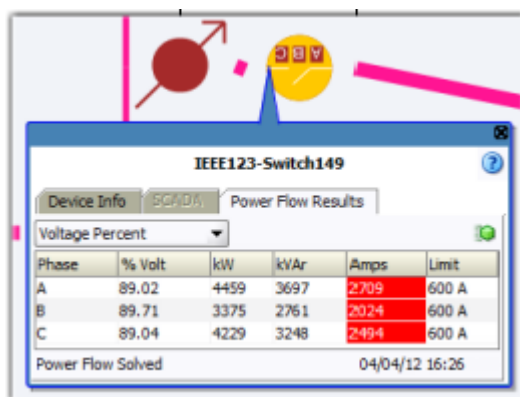
Power Flow results are calculated each time you display the Device Details Power Flow Results. To view Power Flow results for a device in study mode, follow these steps:

1. Start the Viewer.
2. Click  to set the Viewer to Study Mode.
3. Click  to enable Device Details.
4. Click the device.

**Note:** the Power Flow Study Mode Load Scenario dialog appears the first time you select a device in a new Study Session. See **Understanding the Power Flow Study Mode Load Scenario** on page 10-8 for details.


5. Click the Power Flow Results tab, if not active.

The Power Flow Results tab is populated with the calculated results.



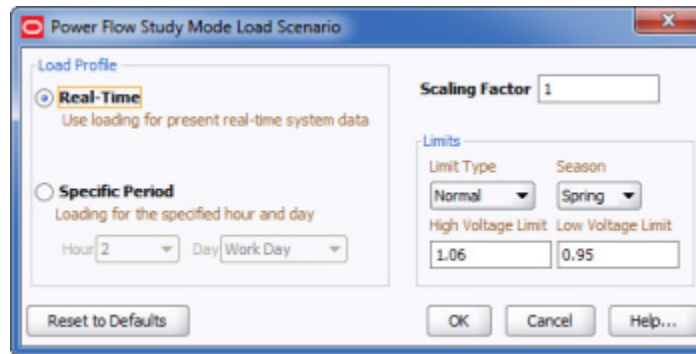
Phase	% Volt	kW	kVA	Amps	Limit
A	89.02	4459	3697	2709	600 A
B	89.71	3375	2761	2024	600 A
C	89.04	4229	3248	2494	600 A

Power Flow Solved 04/04/12 16:26

**Note:** to change the Load Scenario, click the  button on the Power Flow Results tab to reopen the Power Flow Study Mode Load Scenario dialog.

## Understanding the Power Flow Study Mode Load Scenario

The **Power Flow Study Mode Load Scenario** tool allows you to set the parameters for network conditions that the power flow calculations will be based upon.



### Load Profile

Provides an option to choose either loading present real-time values or values for a specific period. For the specific period option, the following information is used:

- **Hour** is the hour to use for calculating results (0-23, Daily Peak).
- **Day** is the type of day, which is typically either Weekend, Work Day, or Seasonal Peak.

### Scaling Factor

The Scaling Factor is a number that modifies the scenario.

### Limits

- **Limit Type** is either Normal or Emergency.
- **Season** is the simulation season (*i.e.*, Summer, Fall, Winter, or Spring).
- **High Voltage Limit** is the high voltage to use for reporting limit violations.
- **Low Voltage Limit** is the low voltage limit to use.

To request a Power Flow solution using the values entered on this window, click **OK**. When the system is finished calculating the results, the Power Flow Study Mode Load Scenario window is closed and the results are displayed in the Power Flow Results tab on the balloon details dialog.

**Note:** Values are not saved when you apply them. The next time you open this dialog, the last saved values (rather than the last applied values) will be displayed. If no values were previously saved, real-time values will be used.

- To reset to real-time values, click **Reset to Defaults**. If you want to request a solution for the default values, click **OK**.
- To close the dialog without any action, click **Cancel**.

## Using Power Flow with Look Ahead

During switching operations, the Look Ahead window allows you to preview the results of switching actions before you perform them. Look Ahead displays information including customers dropped/picked up, critical customers dropped/picked up, and load kVA.

With Power Flow Extensions, the Look Ahead window also includes information about the power flow solution, including the voltage, angle, and current changes that will result from a switching operation. The number of voltage and conductor violations is displayed at the top of the Look Ahead panel.


When you select an operation from the Control Tool, you can click the **Run Power Flow** button on the Look Ahead window to see what the effect would be if you completed the operation. The results are displayed at the top of the Look Ahead window and any violations resulting from the action are displayed in the **Violations Changes/Before/After Tab**. For information about the Look Ahead window, see **Using the Look Ahead Window** on page 1-70.

## Power Flow Solutions Details for Administrative Users

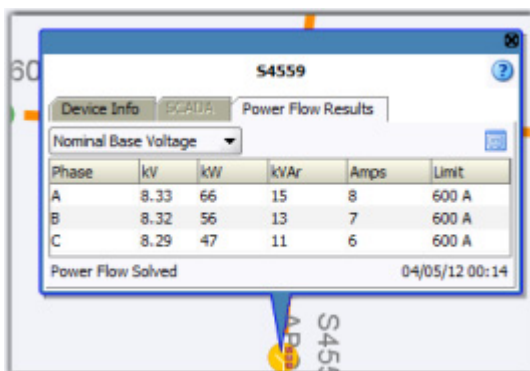
Power Flow solutions details feature allows administrative users to request and review power flow solution details to identify areas of the model with data problems.

The solution details page is available from Power Flow Results tab of the Viewer's Device Details and from Feeder Load Overview table of Feeder Load Management tool.

### Viewing Power Flow Solution Details from the Viewer:

1. Start the Viewer.
2. Click  to enable Device Details.
3. Click the device.
4. Click the Power Flow Results tab, if not active.

The Power Flow Results tab is populated with the calculated results.



Phase	kV	kW	kVAr	Amps	Limit
A	8.33	66	15	8	600 A
B	8.32	56	13	7	600 A
C	8.29	47	11	6	600 A

Power Flow Solved 04/05/12 00:14

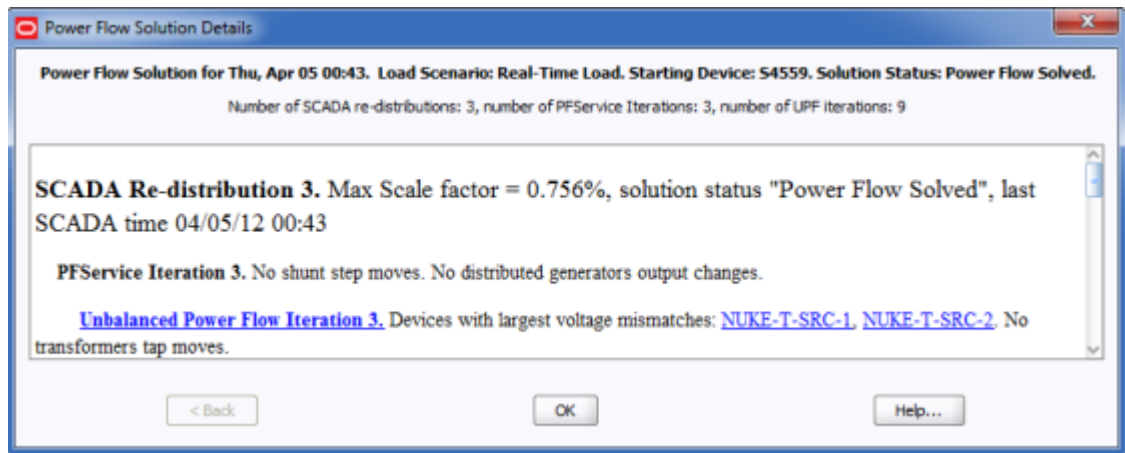
5. Click  to open Power Flow Solution Details.

### Viewing Power Flow Solution Details from the Feeder Load Management Tool:

1. Open Feeder Load Management.
2. Select a row in the Feeder Load Overview table.
3. Select Power Flow Solutions Details from the Actions menu, or the right-click option menu, to open Power Flow Solution Details.



## Using Power Flow Solution Details Window



The solution page includes:

- Title with load scenario, time for the solution, and starting device when the request was sent from the Viewer or starting feeder when the request was sent from FLM. The title also includes the solution status device when the request was sent from the Viewer.
- SCADA re-distributions descriptions.
- Power Flow Service iteration descriptions with list of shunts with step changes and list of distributed generators with output changes. If at least one of the lists is not empty the Power Flow Service iteration will be displayed as a hyperlink to the iteration details page.
- Hyperlinks to the Unbalanced Power Flow iterations with lists of devices with largest voltage mismatches (up to 10 devices) and lists of transformers with tap moves. Click an iteration link to navigate to the iteration page.
- All devices are displayed as hyperlinks, which focus the Viewer on the device.

Click the Back button to navigate back to the summary page.



## Using Suggested Switching

Oracle Utilities Network Management – Suggested Switching helps you generate switching steps for two fundamental types of scenarios. Switching steps can be generated to restore power to a deenergized device, or to deenergize and isolate a device that is currently energized while minimizing the amount of resulting dropped load.

The software produces restoration steps by solving the power flow for each eligible tie point with adjacent feeders, in order to determine the remaining feeder capacity and the overloads after the deenergized section is picked up. Several alternate switching plans may be produced and listed in ranked order. You may then select the desired switching plan and generate it in Web Switching Management. When your objective is to isolate a device, restoration steps are similarly obtained while accounting for the effects of the switching steps required to isolate the desired device.

The Suggested Switching tool uses a wizard approach that steps you through a series of screens to gather input and then presents the results. This allows you to maintain context and easily move backward and forward in the process as needed.

The final step of the Suggested Switching tool is to create a new switching plan with the results of the analysis or to insert the proposed steps into an existing switching plan.

**Note:** Suggested Switching uses Web Switching Management functionality and is only available if you are running Web Workspace with Web Switching Management. See **Web Switching Management** on page 9-1 for more information.

## Suggested Switching Scenarios

This section describes how the Suggested Switching tool would be used in several common scenarios:

**Isolate Only Scenario:** A fault has occurred on a device or emergency maintenance is needed on a device. Suggested Switching can be used to generate the optimal switching steps to completely isolate the device from the system and evaluate the loads to be lost if no further restoration actions are implemented.

**Load Restore:** A deenergized area caused by planned or actual outages must be restored. Suggested Switching can be used to generate recommended switching plans to try to restore the loads as much as possible, and operate switches as little as possible.

**Isolate and Restore:** Suggested switching can also be used to isolate an energized device from the system and restore any downstream loads that are normally supplied by the device.

**Feeder Unloading:** A feeder is highly over-loaded, and some of its loading must be transferred to neighboring feeders or sources to avoid equipment damage or low voltages on the feeder. Based on system topology configurations, Suggested Switching will determine the optimal switching plans to transfer the required amount of loads from the specified feeder.

**Substation Switching - Breakers:** One or more substation breakers need to be taken out of service for maintenance, so the feeders supplied from these breakers must be fed from alternate sources. Suggested Switching will create a plan whereby these breakers can be opened and the load on the feeders can be transferred to alternate supplies.

**Substation Suggested Switching- Bus Section:** One of the bus sections needs to be taken out of service for maintenance, so all feeders fed from that bus section must be transferred to adjacent bus sections or substations. Suggested Switching can be used to identify which feeders should be transferred and recommend optimal plans to restore the supplied loads.

**Substation Suggested Switching- Power Transformer:** A substation has two parallel power transformers, and one transformer needs to be taken out of service. Suggested Switching can be used to generate optimal switching plans to maximally transfer all existing feeders supplied by the transformer to adjacent power transformers or adjacent substations.

## Before You Begin

You can use the Suggested Switching tool to generate a set of steps that can be inserted into a new switching sheet or appended to an existing switching sheet. If you want to add steps to an existing sheet, do the following before you run the Suggested Switching tool:

1. Start Web Switching Management. (See **Starting Web Switching Management** on page 9-2.)
2. Create or select the planned switching sheet to which you want to append optimization plan steps.
3. Click the **Record** button to enable recording. This is required in order for optimization steps to be appended from the wizard.

Before you run the Suggested Switching tool, select one or more devices in the Viewer based on the type of operation you want to perform:

- **Isolate Only** - Select a single energized device
- **Isolate and Restore** - Select a single energized device
- **Restore** - Select a single energized device
- **Feeder Unloading** - Select one or more energized devices that identify a single feeder
- **Substation Switching** - Select one or more devices of the correct type, such as power transformers or breakers

To select more than one device, hold down the CTRL key while clicking on devices in the Viewer.

## Running the Suggested Switching Tool

To start the Suggested Switching tool, first select one or more devices in the Viewer, then select **Suggested Switching...** from the DMS menu. (This option is only enabled if a device is currently selected.)

Each screen in the Suggested Switching wizard displays a context panel on the left side of the screen, which shows all the steps in the process. Completed steps are shown in normal text, the current step is bolded, and the remaining steps are grayed out.

The wizard displays the following screens:

- **Plan Type**
- **Unload Feeder (Feeder Unloading Scenario Only)**
- **Load Scenario**
- **Constraints**
- **Feeders**
- **Plans**
- **Plan Details Page**
- **Summary Page**

The buttons at the bottom of the dialog allow you to step forward and backward through the process or exit the tool.

## Plan Type

Plan Type is the first page of the Suggested Switching wizard. It allows you to select which type of suggested switching operation you want to perform. The following options are displayed:

- **Isolate Only** - Isolate the selected device.
- **Isolate and Restore** - Isolate the selected energized device and restore any downstream sections.
- **Restore** - Restore the selected deenergized device(s).
- **Feeder Unloading** - Transfer load from a single feeder containing the selected devices.
- **Substation Switching** - Isolate one or more substation devices.

When you select an option, the **Next** button is enabled and the list of steps on the left changes to match the type of operation selected. Click **Next** to proceed.

## Unload Feeder (Feeder Unloading Scenario Only)

The Unload Feeder page requires information on load to transfer from the feeder to adjacent feeders for each phase.

- Enter the load capacity in amps for A phase.
- Enter the available load capacity in amps for B phase.
- Enter the available load capacity in amps for C phase.

Click **Next** to proceed.

## Load Scenario

The Load Scenario page is used to select the loading parameters for the suggested switching plan. The solution will use this level of load to determine the best options. To change the scenario, click the **Modify** button to open the Power Flow Study Mode Load Scenario window and modify the parameters.

### Load Profile

The **Load Profile** provides two options:

- **Real Time** is the default load scenario, which uses loading for present real-time system data.
- **Specific Period** uses loading from the historical load profile for the day and hour you specify here. If you specify a value in the Scaling field, then loading will be scaled by this factor.

### Scaling Factor

The **Scaling Factor** field allows the loading parameters to be scaled by the factor entered.

### Limits

The **Limits** field refines the scenario with:

- **Limit Type** - defines whether the scenario is based on Normal or Emergency conditions.
- **Season** - defines the scenario season (Spring, Summer, Fall, or Winter).
- High (**Hi**) and low (**Low**) voltages limits.

Click **Next** to proceed to the Constraints page.

## Constraints

Constraints determine acceptable system conditions for the suggested switching results.

### Calculation Constraints

The Constraints section provides limits on the number of solutions and maximum search time for the scenarios.

- Enter the **Maximum Number of Plans** (solutions) to return.
- Enter the **Number of Steps** (0-100) in Plan.
- Enter the Maximum Time to Search (for a solution), in minutes.

### Objective Weights

In the Objective Weights section, enter the relative weight of each constraint as a positive number, with larger numbers being the most important.

- **Minimum Feeder Voltage** will try to avoid low voltages at any point on the feeder
- **Average Feeder Voltage** will try to avoid low average voltages on a feeder
- **Distance to Feeder Head** will try to minimize the distance along neighboring feeders of tie switches used for load transfers
- **Feeder Remaining Capacity** will try to maximize the remaining feeder capacity of neighboring feeders
- **Tiepoint Remaining Capacity** will try to maximize the tie point capacity of tie switches used for switching

Click **Next** to proceed.

## Feeders

This page displays a list of tie switches to feeders that are adjacent to the selected feeder. Tie switches are displayed in priority order.

If you do not want a feeder to be used for load transfers, uncheck the box in the **Use** column.

To view a switch in the Viewer, select the switch in the list and then click the **View...** button.

To change the priority order of the tie switches, select a tie switch in the list and then click the **Move Up** or **Move Down** buttons. Switches higher in the list are given higher priority.

Click **Next** to proceed. The suggested switching algorithm computes the suggested switching plans based on settings from all the wizard pages that have been filled in to this point.

## Plans

This page displays a list of plans generated by the Suggested Switching tool and some basic information for each plan. The **Stop Solution** button stops generation of processing solutions.

To view detailed result data and steps for a plan, select it in the list and then click the **Plan Details....** button. See **Plan Details** on page 10-15 for more information.

Once you have decided which plan to use, select the plan and click **Next** to proceed.

## Summary

This page displays the plan summary for your review and allows you to insert or append the switching steps into a switching sheet.

To save these steps in a new switching plan, click the **Create Plan...** button. The wizard closes, and a new planned switching sheet opens in the Web Switching Management window.

To insert these steps into a currently open switching sheet, click the **Append Steps...** button. The steps are inserted into the open sheet in the Web Switching Management window.

See **Planned Switching** on page 9-8 for more information about Web Switching Management.

## Plan Details

This page shows details for a selected plan. It contains two tabs.

### Switching Steps Tab

The Switching Steps tab shows the individual switching steps and the effects of each switching step on the feeder where its load is being transferred. Associated violations are shown in the Switching Step Violation tree to the right.

### Feeder Changes Tab

The Feeder tab shows the net effect of all switching changes on each of the affected feeders. This view clearly shows the net change in violations before and after all switching steps are performed.

## Using Volt/VAr Optimization

This section includes the following topics:

- **Overview**
- **Before You Begin**
- **Running the Volt/VAr Optimization Tool**

## Overview

Volt/VAr Optimization generates a set of optimal substation transformer tap positions and capacitor bank statuses to minimize power losses and maintain power quality as the system load changes.

The Volt/VAr Optimization tool uses a wizard approach that steps you through a series of screens to gather input and then presents the results. This allows you to maintain context and easily move backward and forward in the process as needed.

- Volt/VAr Optimization also allows you to specify a particular loading scenario against which to perform the Volt/VAr analysis. Based on the selected load scenario, Volt/VAr optimization uses the real-time load values or appropriately load values from the historic load profile for all load points in the analysis area. The user-selectable load scenarios are:
  - Real-time loads
  - Scaled loads
  - Peak loads
  - Specific period loads

In addition, you can specify the type of device controls to consider for the analysis.

Based on these settings, the tool generates a plan summary and detailed results for individual feeders, along with any violations or dropped loads. A set of implementation steps is also presented, showing substation transformer tap position and capacitor bank status changes. You can save these steps in a new switching sheet or insert them into an open switching sheet.

**Note:** Volt/VAr Optimization uses Web Switching Management functionality and is only available if you are running Web Workspace with Web Switching Management. See **Web Switching Management** on page 9-1 for more information.

## Before You Begin

You can use the Volt/VAr Optimization wizard to generate a set of steps that can be inserted into a new switching sheet or appended to an existing switching sheet. If you want to add steps to an existing sheet, do the following before you run the optimization tool:

1. Start Web Switching Management. (See **Starting Web Switching Management** on page 9-2.)
2. Create or select the planned switching sheet to which you want to append optimization plan steps.
3. Click the **Record** button to enable recording. This is required in order for optimization steps to be appended from the wizard.

Before you run the Volt/VAr Optimization tool, select one or more devices in the Viewer that identify which feeders you want to optimize. To select more than one device, hold down the CTRL key while clicking on devices.

## Running the Volt/VAr Optimization Tool

To start the Volt/VAr Optimization tool, select one or more devices (to identify a set of feeders) in the Viewer and then select the Volt/VAr Optimization option from the DMS menu in the Web Workspace Viewer. (This option is only enabled if a device is currently selected.)

Each screen in the Volt/VAr Optimization wizard displays a context panel on the left side of the screen, which shows all the steps in the optimization process. Completed steps are shown in normal text, the current step is bolded, and the remaining steps are grayed out.

The wizard displays the following screens:

- **Options Page**
- Load Scenario
- **Result Plan Page**
- **Plan Details Page**
- **Summary Page**

The buttons at the bottom of the dialog allow you to step forward and backward through the process or exit the tool.

### Options Page

The first page of the wizard is the Options page, where you specify the basic parameters to use for the optimization. These parameters are described below:

- The **Objective** of the optimization is loss minimization.
- **Controls:**
  - **Transformer Taps** - Check this to allow the optimization to use transformer taps.
  - **Capacitor Banks** - Check this to allow the use of capacitor banks.

### Load Scenario Page

The Load Scenario page allows you to change the load profile, scaling factor, and limits. When you click modify, it opens the Power Flow Study Mode Load Scenario window. See **Understanding the Power Flow Study Mode Load Scenario** on page 10-8 for details.

## Result Plan Page

The next page of the wizard gives an overview of the analysis results. The information on this page cannot be changed. Use the **Plan Details** button to display more detailed result data for individual feeders.

- **Plan Summary** shows loading, losses, and violations before and after optimization.
- The **Plan Implementation Steps** area lists the switching steps required to implement the optimization plan.
- The **Voltage Distribution on Affected Feeders** graph displays the voltage distribution on affected feeders before (in gray) and after (in blue) changes are made.
- Click the **Plan Details Button** to view details results. See the next section for details.

## Plan Details Page

The Plan Details page shows detailed results for each feeder in the analysis.

When you select a feeder from the Feeders list on the top of the page, the Feeder Violations table shows any violations associated with the selected feeder.

To see the device associated with the violation, select a violation in the Feeder Violations list and click the **View...** button. (This button is enabled whenever a violation node is selected.)

## Summary Page

The Summary page displays the implementation steps for the plan.

To save these steps in a new switching plan, click the **Create Plan...** button. The Volt/VAr Optimization wizard closes, and a new planned switching sheet opens in the Web Switching Management window.

To insert these steps into a currently open switching sheet, click the **Append Steps...** button. The steps are inserted into the open sheet in the Web Switching Management window.

See **Planned Switching** on page 9-8 for more information about Web Switching Management.





# Chapter 11

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## Feeder Load Management

This chapter covers the following topics:

- **Overview**
- **Using the Feeder Load Summary**
- **Using the Feeder Load Management Window**
- **Using Real-Time and Study Mode**
- **Data Source and Data Quality**

### Overview

Feeder Load Management (FLM) allows you to manage energy delivery in the electric distribution system and identify problem areas. FLM monitors the vital signs of the distribution system and identifies areas of concern so that the distribution operator is forewarned and can efficiently focus attention where it is most needed. It allows for more rapid correction of existing problems and enables possibilities for problem avoidance, leading to both improved reliability and energy delivery performance.

FLM is cyclically executed and automatically triggered by pertinent changes in the electric distribution system, such as increased demand or switch status changes. FLM uses a combination of SCADA derived scaling factors, load profiles, and a globally supplied scaling factor to predict load for future forecasting.

**Note:** FLM will use SCADA supplied scaling factors (in addition to load profile data) for a configurable period of time before transitioning to using global scaling factors. FLM uses a linear transition between the SCADA scaling factor and the global scaling factor.

Feeder Load Management tools are dynamically updated after each FLM execution, which may be performed periodically and in response to changes in the electrical network. Time between FLM periodic executions, as well as other FLM execution parameters, is configurable. Administrative users can view or change this setting on the Configuration Assistant **Using the Event Management Rules Tab**, in the Power Flow Related Rules category and Feeder Load Management subcategory.

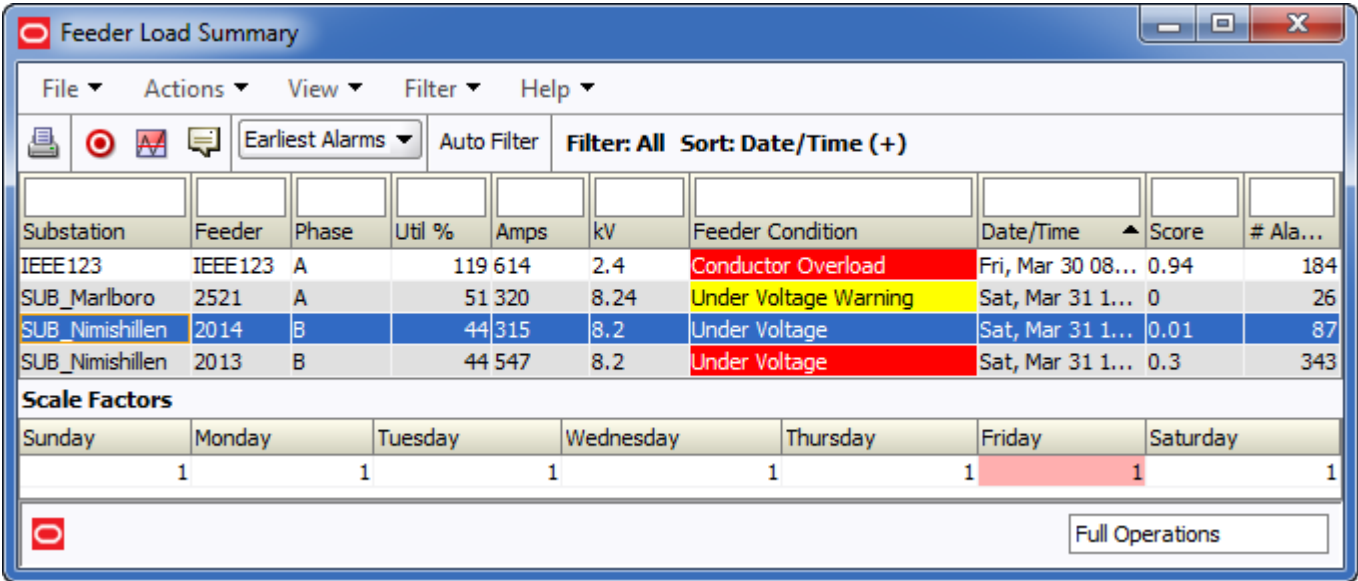
The **Feeder Load Summary** tool provides dynamically updated views of closest-in-time alarms, peak loads, and present loads of all feeders. From the Feeder Load Summary, you may drill down to those feeders where capacity margins and/or device limits are at risk or violated using the Feeder Load Management window.

The **Feeder Load Management** window provides load summaries, as well as Device Violations, Feeder Load Details, Tie Points Capacity Overview, Transformers, Capacitor Banks, and Equivalent Sources Details. You can initiate Feeder Load Management calculations in Study Mode

with different load scale factors and topology to predict selected feeders performance for different switching scenarios.

## Using the Feeder Load Summary

The Feeder Load Summary, available from the Web Workspace Tools menu, provides an overview of feeder performance. The data shows closest-in-time alarms, peak loads, and present loads of all the feeders within your subscribed control zone authority.




Feeder Load Summary data is dynamically updated after each FLM execution, which may be performed periodically or in response to changes in the electrical network. Time between FLM periodic executions, as well as other FLM execution parameters, is configurable.

**Note:** Administrative users can view or change this setting on the Configuration Assistant **Using the Event Management Rules Tab**, in the Power Flow Related Rules category and Feeder Load Management subcategory.




## Menus and Toolbar

The Feeder Load Summary window provides the following menu and toolbar options.

### File Menu

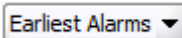
Menu Option	Description	Toolbar Icon
Print	Prints the Feeder Load Summary table.	
Exit	Closes the Feeder Load Summary window.	--

## Actions Menu

Menu Option	Description	Toolbar Icon
View...	Focus the Viewer on the selected feeder.	
Feeder Load Management Tool...	Opens and/or updates the Feeder Load Management Tool window. This button is disabled until you select row(s) in the Feeder Load Summary table with available FLM data. If multiple rows are selected, the Feeder Load Management window displays details for multiple feeders.	
Data source and data quality	Toggles the data source and data quality balloon. When active, a balloon dialog displays feeder head data source and data quality information for the selected row. See <b>Data Source and Data Quality</b> on page 11-20 for more information.	

## View Menu

Menu Option	Description	Toolbar Icon
Earliest Alarms [Control-E]	The <i>Earliest Alarms</i> list shows closest in time problems for each feeder. The list is sorted by the <b>Date/Time</b> column showing earlier problems first. If a feeder does not have any violations or warnings in the next 6 days, it will not be presented in the list.	See note.
Peak Loads [Control-W]	The <i>Peak Loads</i> list shows worst Feeder Condition for each feeder in the next 6 days. The list is sorted by the score showing worse problems first.	See note.
Present Loads [Control-N]	The <i>Present Loads</i> list shows the current loads, sorted by score.	See note.


Views may be selected from the drop-down list on the toolbar: 


## Filter Menu

Menu Option	Description	Toolbar Icon
All	Show all feeders.	--
Violations Only	Show only feeders with violations.	--
Violations and Warnings	Show only feeders with violations or warnings.	--

### Notes:

The Feeder Load Management Summary table supports **Quick Sorting**, **Dynamic Filtering**, and **Auto Filtering**.

Click the **Auto Filter** button (  ) to show only rows that match the selected **cell**. Auto Filter is disabled until you select a row in the Feeder Load Summary table.

Once an auto filter is applied, this button is replaced by the Auto Filter Off button (  ).

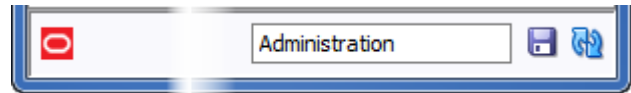
Help Menu


Menu Option	Description	Toolbar Icon
Feeder Load Summary Help [F1]	Launches online help for Feeder Load Summary.	--


Status Bar

The Feeder Load Summary window status bar displays the user type: Administration, Full Operations, or View Only.

The Administration user’s status bar provides access to save and refresh functions.



The **Save** button (  ) is enabled when scale factors have been modified. See **Scale Factors Table** on page 11-5 for more information.

The **Refresh** button (  ) starts a new Feeder Load Management calculation. If a calculation is already in progress, the system will return a message that a forecast is in progress and that changes will be reflected in the next solution, which will begin immediately after the in-progress calculation is completed.

Feeder Load Summary Panels

The Feeders Load Summary window is divided into two sections or panels; each panel displays a table:

- **Feeder Load Summary Table**
- **Scale Factors Table**

Feeder Load Summary Table

The Feeder Load Summary table shows a list of feeders. By default, the Earliest Alarms view is displayed. Other available views are Peak Loads and Present Loads. To switch between views, click the appropriate toolbar button or select the appropriate option from the View menu.

The Feeder Load Management Summary table displays the following fields and buttons.

- **Substation** – the substation name.
- **Feeder** – the feeder name. This column displays a yellow background for feeders with abnormal data quality or/and data source for any of the phases. See **Data Source and Data Quality** on page 11-20 and **Feeder/Device Condition Names and Colors** on page B-5 for more details.
- **Phase** – phase with the maximum capacity utilization.

- **Util %** – feeder head utilization capacity.
- **Amps** – electrical current on the phase with the maximum capacity utilization.
- **KW** – active power on the phase with the maximum capacity utilization. This column is hidden by default. Right-click the table's header to open the Select Columns dialog, where you can select/unselect columns to display.
- **kVAr** – reactive power on the phase with the maximum capacity utilization. This column is hidden by default. Right-click the table's header to open the Select Columns, dialog where you can select/unselect columns to display.
- **kV** – voltage on the phase with the maximum capacity utilization.
- **Feeder Condition** – violation or warning (if any) on a feeder. When multiple violations/warnings occur on a feeder, this column shows the highest-level violation. Traffic signal coloring is used for this column:

Red = Violations Exist,  
 Yellow = Warnings Exist,  
 Green = No Warnings/Violations Exist.

This column's values and coloring are configurable by changing the FLMSummary.xml file. See **Feeder/Device Condition Names and Colors** on page B-5 for a list of feeder/device conditions and their corresponding cell and text coloring.

- **Date/Time** – date and time for the displayed feeder condition.
- **Score** – EDA score of the feeder at the time of the condition.
- **# Alarms** – total number of alarms on the feeder at the time.

## Scale Factors Table

This table displays load week days' scale factors for future Feeder Load Management forecasts calculations. The pink background highlights the current day's scale factor. (Only administration users can edit the scale factors in this table.) This table is updated every time the Feeder Load Summary table is updated.

## Using the Feeder Load Management Window

The Feeder Load Management window provides detailed information about feeder loads, device violations and warnings, tie points capacity, and regulation devices. It supports real-time and study mode.

This section includes the following topics:

- **Accessing the Feeder Load Management Window**
- **Features of the Feeder Load Management Window**
- **Viewing and Modifying Study Session Parameters**
- **Requesting a New Feeder Load Management Calculation**


Related Topics:

- **Using the Feeder Load Summary**

## Accessing the Feeder Load Management Window

You can open the Feeder Load Management window from the Viewer or from the Feeder Load Summary window.

### From a Viewer


To open the Feeder Load Management window from a Viewer, click the  button on the Viewer toolbar or select Feeder Load Management... from the Viewer's DMS menu.

The Feeder Load Management mode is defined by the Viewer's mode.

**Note:** Feeder Load Management can be disabled for some of the feeders during the Model Build (see Model Build Guide for more information). If Feeder Load Management is disabled for a feeder, the Feeder Load Management button will be disabled when that feeder is selected in the Viewer.

### From the Feeder Load Summary Window

From the Feeder Load Summary window, you can open the Feeder Load Management window for a single feeder or for multiple feeders.

- To open the Feeder Load Management window for a single feeder, double-click the corresponding row in the Feeder Load Summary table or right-click the row and select **Feeder Load Mgmt Tool** or **Feeder Load Mgmt Tool 2** from the pop-up menu.
- To open the window for multiple feeders, select the corresponding rows in the Feeder Load Summary Table and click the  button on the toolbar.

The Feeder Load Management window opens in real-time mode. Once the window is open, you can switch modes by pressing the corresponding button on the toolbar.

**Note:** The system allows you to have two open Feeder Load Management Tools at any time. Multiple Feeder Load Management Tools can be used to compare the details for different feeders.

## Features of the Feeder Load Management Window

The Feeder Load Management window is used to view detailed information about feeder loads, device violations and warnings, tie points capacity, and regulation devices. You can initiate Feeder Load Management calculations in Study Mode with different load scale factors and topology to predict selected feeders' performance for different switching scenarios.


The Feeder Load Management window displays a pull-down menu, toolbar, status bar, and two views. It has two modes: study and real-time. Each of these features is described in the sections that follow:

- **Menus and Toolbar**
- **Options Menu**
- **Status Bar**
- **Graphical View Tab**
- **Feeder Load Overview Tab**
- **Feeder Load Management Details**
- **Using Real-Time and Study Mode**
- **Viewing and Modifying Study Session Parameters**
- **Requesting a New Feeder Load Management Calculation**
- **Selecting Columns to Display**
- **Data Source and Data Quality**

### Menus and Toolbar

The Feeder Load Management window provides the following pull-down menu options and toolbar options.

#### File Menu



Menu Option	Description	Toolbar Icon
Exit	Closes the Feeder Load Management window.	

#### Filter Menu


Select the filter to use for limiting the feeders displayed in the Feeder Load Overview table. Available filters are:

Menu Option	Description	Toolbar Icon
All	Displays all data.	--
Present Measurements	Displays only data for the present time.	--
Hourly Forecasts	Displays only forecasts for the next 24 hours.	--
Daily Peaks	Displays only daily peak forecasts for the next 6 days.	--

## Actions Menu

Menu Option	Description	Toolbar Icon
Real Time	Switches to real-time mode. (This option is grayed if Real-Time Mode is active.)	
Study Mode	Switches to study mode. (This option is grayed if Study Mode is active.)	
Re-enable Island	The <b>Re-enable Island</b> action is enabled for Administration users when selecting a row with a Non-Convergent solution. The action tells PFService to attempt to solve the island for the next forecast.	--

## Options Menu

Menu Option	Description	Toolbar Icon
Power Flow Options...	Allows you to configure Real-Time Power Flow Options if you are in real-time mode. If you are in Study Mode, click this button to configure Study Mode Load Scenario.	
Select Columns...	Opens the Select Columns to Display dialog for you to select which columns you want to appear in the table on the Feeder Load Management window. If a column is not checked, it will be displayed in the Additional Columns balloon details window rather than on the main window.	--

## Help Menu


The Help menu provides standard Help and About options.

## Status Bar

The status bar displays at the bottom of the Feeder Load Management window.



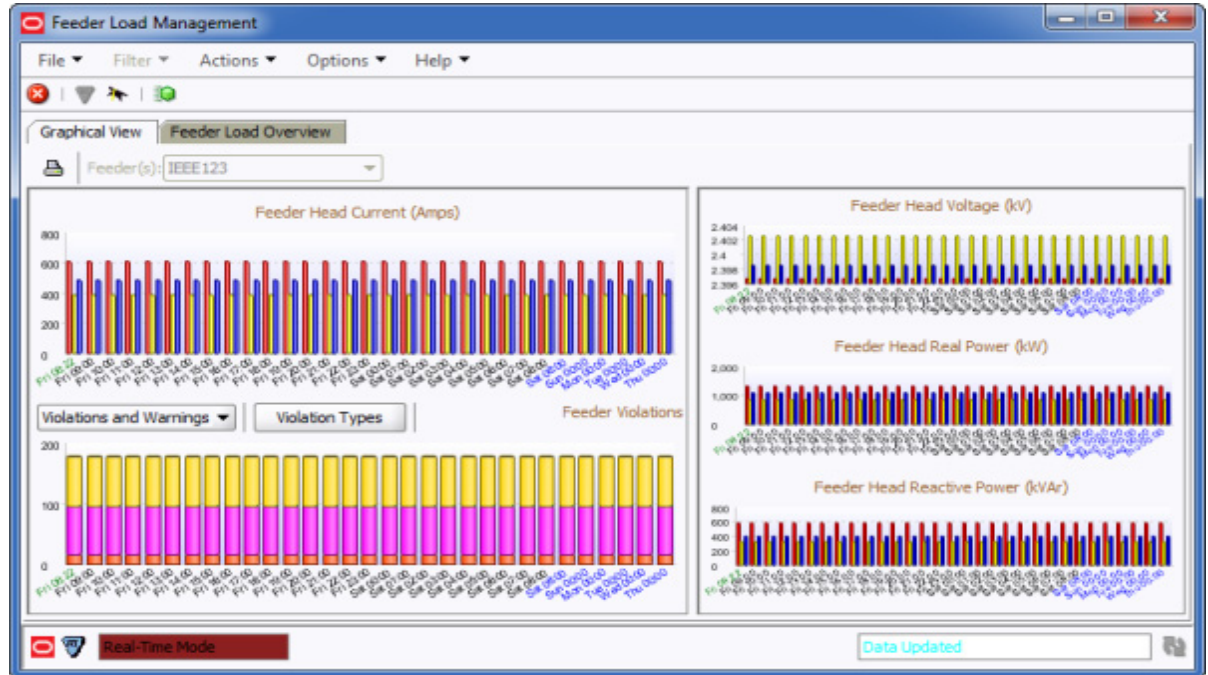
It provides the following information and functions:

1. Real-time or study mode indicators.
2. Indicates if data has been updated or if there are real-time data updates available.
3. Refresh button (  ). Note that this button is disabled when there are no updates available or when the Feeder Load Management Tool is in study mode.



## Graphical View Tab

The **Graphical View** tab is active when you initially start the Feeder Load Management tool. The Graphical View allows you to quickly see the trends in the forecasted data.



The Graphical View shows five different graphs:

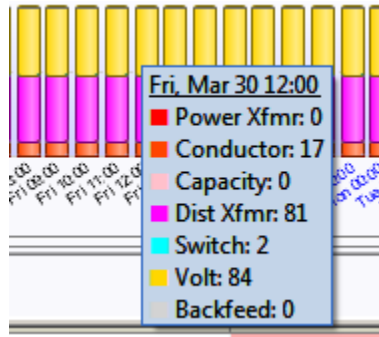
- Feeder Head Current
- Total Feeder Violations
- Feeder Head Voltages
- Feeder Head Real Power
- Feeder Head Reactive Power

For the currents, voltages, and power graphs, the bar graphs show three bars, representing results data for three phases.

- The X axis displays the time of the forecast, with values for real-time loading, 24-hour forecast values, and 6 daily peak forecasts.
- The axis label colors are based on forecast type and are consistent with the colors used on the Date/Time column of the tabular display.
- Use the slider between the left side of the tab (displaying the Current and Violations) and the right side of the tab (displaying Voltage and Power) to resize the graphs.

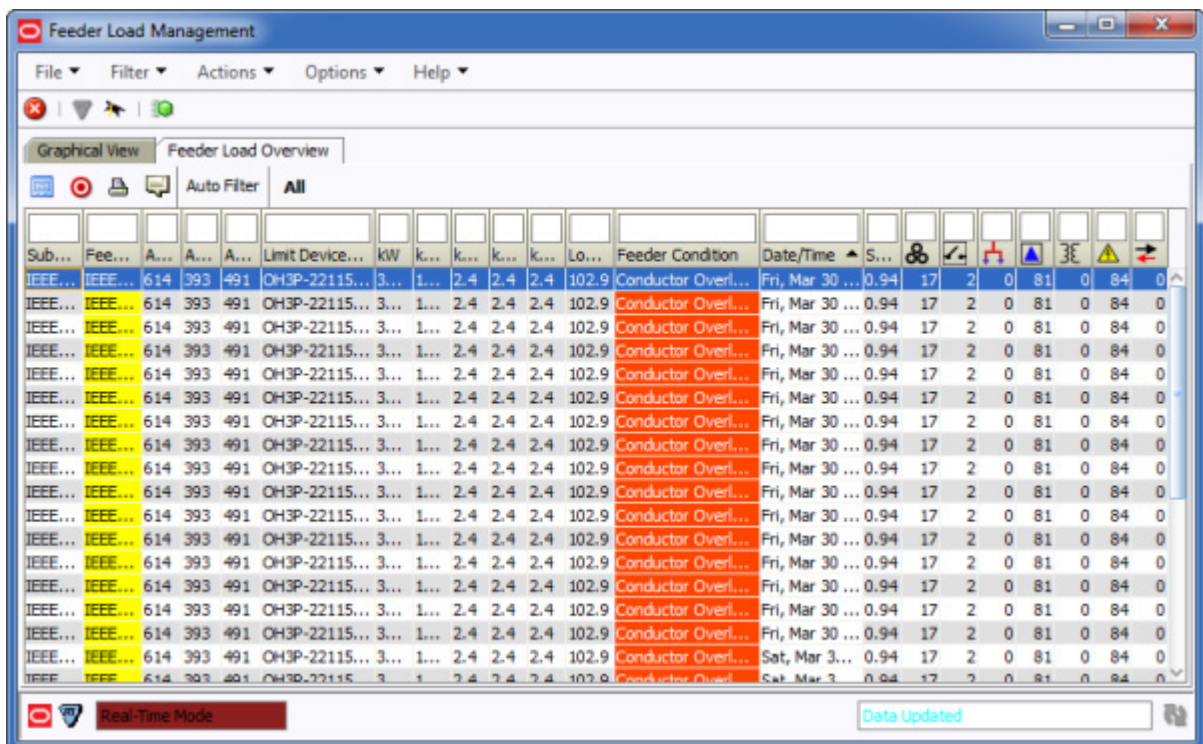
Use the Feeder selection box at top of tab to display data for a different feeder, if the Feeder Load Management Tool is showing results for more than one feeder.

The Feeder Load Overview tab provides feeder load data for the feeder(s) that were selected when the Feeder Load Management window was initiated or updated (either from the Viewer or the Feeder Load Summary window).



In real-time mode, the Feeder Load Overview displays:







- In Study Mode, the Feeder Load Overview displays current study session data calculated by the Feeder Load Management tool based on the user's request from the **Viewing and Modifying Study Session Parameters**.



In Study Mode, the Feeder Load Overview displays current study session data calculated by the Feeder Load Management tool based on the user's request from the **Viewing and Modifying Study Session Parameters**.

## Toolbar

The Feeder Load Overview toolbar provides the following options:








- Click  to open the **Feeder Load Management Details** for the selected row.
- Click  to focus the Viewer on a selected feeder. This button is disabled until the user selects a row in the Feeder Load Overview table.
- Click  to print the Feeder Load Overview table.
- Click  to toggle on/off the balloon dialog. When this button is toggled on and a Load Overview row is selected, a balloon dialog displays the selected row's hidden columns.
- Click  to show only rows that match the selected cell. Once an auto filter is applied, this button is replaced by the Auto Filter Off button.
- Click  to remove a previously selected auto filter.

The toolbar also displays the current summary view name and the names of applied filters and sorts.

## Feeder Load Overview Table

The Feeder Load Overview table includes the following columns:

- **Substation** – The substation name.
- **Feeder** – The feeder name. This column displays a yellow background for rows with abnormal data source or/and data quality for any of the phases. See **Feeder/Device Condition Names and Colors** on page B-5 for more details.
- **Amps A** – Phase A feeder head load and utilization capacity.
- **Amps B** – Phase B feeder head load and utilization capacity.
- **Amps C** – Phase C feeder head load and utilization capacity.
- **Limit Device (%)** - device name and usage percentage for a phase limiting device with the biggest usage. Visible by default.
- **Limit Device A (%)** - Phase A limiting device name and usage percentage. Hidden by default.
- **Limit Device B (%)** - Phase B limiting device name and usage percentage. Hidden by default.
- **Limit Device C (%)** - Phase C limiting device name and usage percentage. Hidden by default.
- **kW** - Total kW for all phases
- **kW A** – Feeder Head Phase A Active Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **kW B** – Feeder Head Phase B Active Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **kW C** – Feeder Head Phase C Active Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **kVAr** - Total kVAr for all phases.
- **kVAr A** – Feeder Head Phase A Reactive Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.

- **kVAr B** – Feeder Head Phase B Reactive Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **kVAr C** – Feeder Head Phase C Reactive Power. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **kV A** – Feeder Head Phase A Voltage.
- **kV B** – Feeder Head Phase B Voltage.
- **kV C** – Feeder Head Phase C Voltage.
- **Loss** – Power loss for the feeder.
- **Feeder Condition** – The violation or warning (if any) on a feeder. See **Feeder/Device Condition Names and Colors** on page B-5 for the range of values and colors for this column. When multiple violations/warnings occur on a feeder, this column shows the highest-level violation.
- **Date/Time** – The date and time for the displayed feeder condition.
- **Score** – The EDA score of the feeder at the time of the condition.
-  – The number of conductor overloads.
-  – The number of switch overloads.
-  – The number of feeder capacity violations.
-  – The number of service transformer overloads.
-  – The number of power transformer overloads.
-  – The number of voltage violations.
-  – The number of backfeeds.
- **Source A** - Phase A source. This column is hidden by default in the main table and appears in the Additional Columns balloon. See **Selecting Columns to Display** for more details.
- **Source B** - Phase B source. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **Source C** - Phase C source. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **Quality A** - Phase A quality code. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **Quality B** - Phase B quality code. This column is hidden by default in the main table and appears in the Additional Columns balloon.
- **Quality C** - Phase C quality code. This column is hidden by default in the main table and appears in the Additional Columns balloon.

**Note:** Some fields are displayed in the table by default, and others appear in the Additional Columns balloon dialog by default. Use the **Set Columns...** option on the Options menu to can configure which fields you want to appear in the table on the main window and which ones you want to appear in the balloon dialog.

### Sorting and Filtering

The Feeder Load Management tabular view supports **Quick Sorting**, **Dynamic Filtering**, and **Auto Filtering**.

### Selecting Columns to Display


You can choose which columns of data you want to appear in the tables on the Feeder Load Management Tabular View tab. This allows you to focus on particular information.

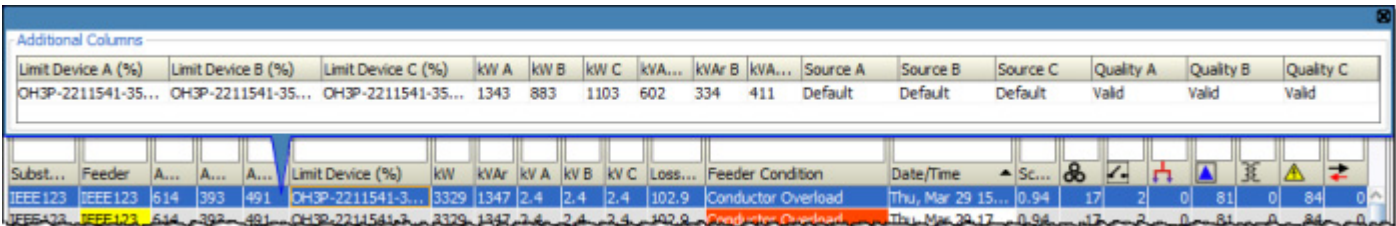
To select columns for display, follow these steps:

1. Choose **Select Columns...** from the Feeder Load Management Actions menu or right-click the Feeder Load Management table header and choose **Select Columns...** from the pop-up menu. A list of available columns is displayed. Checked columns are currently displayed.
2. To add a column that is not currently displayed, click in the checkbox next to the column name.
3. To remove a column that is currently displayed, click to uncheck the box.
4. Click **OK**.
5. If you want to save these columns settings so they will be used in future sessions, select **User Preferences** from the Web Workspace Tools menu, and then click Save.

### Displaying Data for Hidden Columns

If you have one or more columns currently hidden from view, you can use the balloon dialog to display the hidden data. Follow these steps:

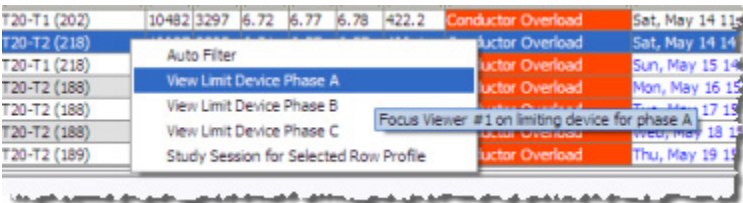
1. First, make sure that the balloon dialog is enabled for the table containing the hidden columns.  
If not currently enabled, click the  button in the panel's toolbar.  
**Note:** If all columns are currently displayed in the table, the balloon dialog button is disabled.
2. Click on a specific cell or row in the table. The balloon dialog displays all hidden columns and data in table format, as shown below:



Limit Device A (%)	Limit Device B (%)	Limit Device C (%)	kW A	kW B	kW C	kVA...	kVA B	kVA...	Source A	Source B	Source C	Quality A	Quality B	Quality C
OH3P-2211541-35...	OH3P-2211541-35...	OH3P-2211541-35...	1343	883	1103	602	334	411	Default	Default	Default	Valid	Valid	Valid

### Viewing the Limiting Device by Phase

To view the limiting device in the viewer, right-click the Feeder Load Overview row and select from the View Limit Device Phase options for the applicable phase (e.g., View Limit Device Phase A). Viewer 1 will focus on the device.

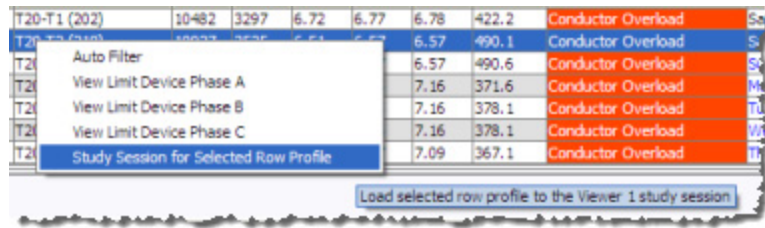


T20-T1 (202)	10482	3297	6.72	6.77	6.78	422.2	Conductor Overload	Sat, May 14 11:15
T20-T2 (218)							Conductor Overload	Sat, May 14 14:15
T20-T1 (218)							Conductor Overload	Sun, May 15 14:15
T20-T2 (188)							Conductor Overload	Mon, May 16 15:15
T20-T2 (188)							Conductor Overload	Tue, May 17 15:15
T20-T2 (188)							Conductor Overload	Wed, May 18 15:15
T20-T2 (189)							Conductor Overload	Thu, May 19 15:15




### Starting a Study Session for Selected Row Profile

Each row in the Feeder Load Management window corresponds to a specific network condition. By selecting *Study Session for Selected Row Profile* from the right-click option menu, you can go directly into the **Power Flow Study Mode Load Scenario** to begin a study session in the Viewer based on the conditions in the row.



### Feeder Load Management Details

The **Feeder Load Management Details** window provides information about a selected row in the **Feeder Load Management Feeder Load Overview Tab**. It is accessed by double-clicking the row or by clicking the  button.

The Feeder Load Management Details window has seven possible tabbed data views. Any views that do not return data will be desensitized.

- **Violations** – displays identified device overload violations and energy assessment warnings for the feeder selected in the **Feeder Load Overview Tab**.
- **Tie Points** – displays all three-phase open tie points for the feeder selected in the **Feeder Load Overview Tab**.
- **Transformers** – displays all Transformers electrically connected to feeder selected on the **Feeder Load Overview Tab**.
- **Capacitors** – displays all downstream capacitor banks for the feeder selected on the **Feeder Load Overview Tab**.
- **Equivalent Sources** – displays all sources electrically connected to the feeder selected on the **Feeder Load Overview Tab**.
- **Equivalent Sources** – displays all sources electrically connected to the feeder selected on the **Feeder Load Overview Tab**.
- **Load Details** – displays SCADA measurements for applicable devices.

### Violations



The **Violations** tab displays identified device overload violations and energy assessment warnings for the feeder selected in the **Feeder Load Overview Tab** panel.

The Violations data includes the following columns:

- **Device** – The device's name
- **Violation** – The violation or warning name. See **Feeder/Device Condition Names and Colors** on page B-5 for range of values and colors for this column.
- **Phase** – The phase that the violation is on
- **Value** – The violation/warning value
- **%** – Value percent of limit. The Violations table is sorted based on this column.
- **Limit** – The device limit for violated attribute

### Violations Toolbar

The Violations toolbar provides the following options:

- Click  to focus the Viewer on the selected device.
- Click  to print the table.
- Select the data criteria from the Violations Only, Warnings Only, or Violations and Warnings options menu.
- Select the device class from the Violations Types options menu. The number of devices having the violations or warnings is provided in parenthesis.

### Tie Points




The Tie Points tab displays all three-phase open tie points for the feeder selected in the **Feeder Load Overview Tab**. A tie point is a three-phase open switch of an accepted and configured set of switch classes. The open switch doesn't need to be in its nominal position.

The Tie Points Capacity table includes the following columns:

- **Tie Point** – The tie point name
- **To Feeder** - The adjacent feeder that will be connected to the current feeder if the tie point is closed.
- **To Substation** - The *To Feeder's* substation name
- **To Feeder Amps A** - To Feeder Phase A Current
- **To Feeder Amps B** - To Feeder Phase B Current
- **To Feeder Amps C** - To Feeder Phase C Current
- **Pickup Amps A** - Phase A current pickup capacity
- **Pickup Amps B** - Phase B current pickup capacity
- **Pickup Amps C** - Phase C current pickup capacity
- **Limit Device Phase A** - ID of limiting device for Phase A.
- **Limit Device Phase B** - ID of limiting device for Phase B.
- **Limit Device Phase C** - ID of limiting device for Phase C.

### Tie Points Toolbar

The Feeder Tie Points Capacity Overview toolbar provides the following options:


- Click  to focus the Viewer on a selected feeder. This button is disabled until the user selects a row in the Tie Points Capacity table.
- Click  to open Feeder Load Management 2 for the feeder listed in the To Feeder column of the selected row. This button is disabled until the user selects a row in the Tie Points Capacity Overview table. If Feeder Load Management 2 is already open, it is updated with the data for the "To Feeder."
- Click  to print the Tie Points table.

## Transformers

The Transformers tab displays all Transformers electrically connected to feeder selected on the **Feeder Load Overview Tab**.

The Transformer Details table includes the following columns:

**Note:** Administration and Full Operations users can change some of regulation devices parameters in Real-Time Mode for non-SCADA devices. Both SCADA and non-SCADA devices settings can be edited in Study Mode. Editable cells display a pink background.

Press the  button on the tab's toolbar to save the changes and trigger resolve for the selected feeder. Editing in Real-Time Mode is available only when a present load row is selected in the Feeder Load Overview table.


- **Device** – The device name
- **kV A** – Device Phase A Voltage
- **kV B** – Device Phase B Voltage
- **kV C** – Device Phase C Voltage
- **Voltage Setpoint** - The regulation set point. Administration and Full Operations users can change the value of this column when the Regulation Type is not “No Tap” or “Fixed Tap” and the Automatic Control is on.
- **Tap Step** - The tap step position. Administration and Full Operations users can change the value of this column to a value between Min Tap Step and Max Tap Step when the Regulation Type is not “No Tap” and the Automatic Control is off.
- **Min Tap Step** - The minimum tap step position
- **Max Tap Step** - The maximum tap step position
- **Regulation Type** – The regulation type
- **Automatic Control** – Administration and Full Operations users can switch the value of this column between on and off when the Regulation Type is not “No Tap” or “Fixed Tap.”

## Capacitors

This tab displays all downstream capacitor banks for the feeder selected on the **Feeder Load Overview Tab**.

The Capacitors table includes the following columns:

**Note:** Administration and Full Operations users can change some of regulation devices parameters in Real-Time Mode for non-SCADA devices. Both SCADA and non-SCADA devices settings can be edited in Study Mode. Editable cells display a pink background.

Press the  button on the tab's toolbar to save the changes and trigger resolve for the selected feeder. Editing in Real-Time Mode is available only when a present load row is selected in the Feeder Load Overview table.

- **Device** – The device name
- **kVAr A** – Device Phase A Reactive Power
- **kVAr B** – Device Phase B Reactive Power
- **kVAr C** – Device Phase C Reactive Power
- **On Threshold** - The on threshold. Administration and Full Operations users can change the value of this column when the Regulation Type is not fixed and the Automatic Control is on.




- **Off Threshold** - The off threshold. Administration and Full Operations users can change the value of this column when the Regulation Type is not fixed and the Automatic Control is on.
- **# Energized Capacitors** – The number of energized capacitors. Administration and Full Operations users can change the value of this column to a value between 0 and # Total Capacitors when the Automatic Control is off.
- **# Total Capacitors** – The total number of capacitors
- **Regulation Type** – The capacitor regulation type. The regulation types is displayed as one of the following: Fixed, Bus Voltage, Line Current, Line VAR, Line Power Factor, or Temperature.
- **Measurement Attribute** – The monitored attribute of regulated bus voltage, line flow, or area time/temperature.
- **Automatic Control** – Administration and Full Operations users can switch the value of this column between on and off when the Regulation Type is not fixed.

### Equivalent Sources

This tab displays all sources electrically connected to the feeder selected on the **Feeder Load Overview Tab**.

The Equivalent Sources table includes the following columns:

**Note:** Administration and Full Operations users can change some of regulation devices parameters in Real-Time Mode for non-SCADA devices. Both SCADA and non-SCADA devices settings can be edited in Study Mode. Editable cells display a pink background.

Press the  button on the tab's toolbar to save the changes and trigger resolve for the selected feeder. Editing in Real-Time Mode is available only when a present load row is selected in the Feeder Load Overview table.

- **Source Name** – The name of the source
- **kW A** – Source Phase A Active Power
- **kW B** – Source Phase B Active Power
- **kW C** – Source Phase C Active Power
- **kVAr A** – Source Phase A Reactive Power
- **kVAr B** – Source Phase B Reactive Power
- **kVAr C** – Source Phase C Reactive Power
- **Amps A** – Source Phase A Current
- **Amps B** – Source Phase B Current
- **Amps C** – Source Phase C Current
- **kV** - Administration and Full Operations users can change the value of this column for non-SCADA devices. The user can edit measurements for SCADA devices in the SCADA Summary. To open the SCADA Summary window, right-click a row for SCADA device and select the **SCADA Summary** in the popup menu.
- **Angle** - Administration and Full Operations users can change the value of this column for non-SCADA devices.
- **Validity** - Data validity. Possible values: Valid, Suspect, or Invalid.

### Distributed Generation

The Distributed Generation tab displays sources of distributed energy generation on the feeder. The Distributed Generation table includes the following columns:

- **Name** – The name of the generator
- **kV A** – Voltage A (kV)
- **kV B** – Voltage B (kV)
- **kV C** – Voltage C (kV)
- **Voltage Regulated** – Voltage
- **Voltage Setpoint** – Voltage Setpoint (p.u.)
- **Min PF - Leading** – Minimum Leading Power Factor
- **Min PF - Lagging** – Minimum Lagging Power Factor
- **kW** – Real Power Output (kW)
- **kVAr** – Reactive Power Output (kVAr)

### Load Details

The Load Details tab displays all sources electrically connected to the feeder selected on the **Feeder Load Overview Tab**. The feeder head will typically characterize each feeder and 3 to 5 closed sectionalizing devices. Some of these sectionalizing devices will have measurements and may be supervisory control points. Note: This panel is available only when a present load row is selected in the Feeder Load Overview table.

The Load Details includes the Feeder Load Details table and a toolbar. The Load Details table includes the following columns:

- **Device Name** – The name of the device
- **Amps A** – Source Phase A Current
- **Amps B** – Source Phase B Current
- **Amps C** – Source Phase C Current
- **kW A** – Source Phase A Active Power
- **kW B** – Source Phase B Active Power
- **kW C** – Source Phase C Active Power
- **kVAr A** – Source Phase A Reactive Power
- **kVAr B** – Source Phase B Reactive Power
- **kVAr C** – Source Phase C Reactive Power
- **kV A** – Source
- **kV B** – Source
- **kV C** – Source
- **Quality A** – Phase A SCADA data quality
- **Quality B** – Phase B SCADA data quality
- **Quality C** – Phase C SCADA data quality

## Using Real-Time and Study Mode

If you start or update the Feeder Load Management Tool from the Viewer, the tool's mode is defined by the Viewer's mode.

If you start or update the tool from the Feeder Load Summary window, the tool opens in real-time mode. Once the tool is open, you can switch modes by pressing the corresponding button on the toolbar or selecting the appropriate menu option.

When you start the tool in Study Mode or switch from real-time to study mode inside the tool, the **Power Flow Study Mode Load Scenario** dialog prompts you to select the Load Profile from either the real-time system or from a specific period (hour and type of day). Once the Load Scenario is selected, the Viewer title bar will display the study session parameters. For example, **Viewer 1 [Study Mode: 100% of Work Day, 18:00 profile]**.



## Viewing and Modifying Study Session Parameters

The Study Session Parameters dialog allows you to request a new Feeder Load Management calculation for the current study session's topology.

You can specify power flow options, the start date and time, type, and number of forecasts to calculate. You can also change the scale factor for any day of a week.

When the Feeder Load Management tool switches between real-time and study mode, Viewer #1 switches to the same mode. An existing study session is used as the Feeder Load Management Tool Study Session or, if none exists, a new study session is created based on the real-time data. The user can reset the study session from the Viewer. The session can be reset to nominal or real-time data. The Feeder Load Management mode **does not change** when the Viewer switches between real-time and study mode.

To display the Study Session Parameters dialog, do one of the following:

- In real-time mode, click the  button on the Feeder Load Management Tool toolbar or select **Study Mode** from the Actions menu.
- In study mode, click the  button on the Feeder Load Management Tool toolbar or select **FLM and Power Flow Options** from the Actions menu.

The Study Session Parameter dialog displays the following fields and buttons:

### Feeder Load Management Options Panel

- **Start Date/Time** - The start date and time for the calculation. Requested calculations must be within a week (7 days) of the current date/time.
- **Hourly Forecasts / Daily Peak Forecasts** - The type of forecast to calculate. You can request either hourly or daily peaks forecasts calculations (but not both).
- **Number of Hourly Forecasts** - The number of hourly forecasts to calculate. This value must be between 1 and 24. (This value is used only if Hourly Forecasts is selected above.)
- **Number of Daily Forecasts** - The number of daily forecasts to calculate. This value must be between 1 and 7. (This value is used only if Daily Peak Forecasts is selected above.)

### Limits Panel

- **Limit Type** - Indicates the limit type, either Normal or Emergency.
- **Season** - Indicates the season, such as Spring, Summer, etc.
- **Voltage Limits** - Specifies high and low voltage limits.
- **Modify Button** - opens the Power Flow Study Mode Load Scenario dialog with the option to change the limits.



**Scale Factors** (Sunday through Saturday) - The scale factors to use for each day of the week.

#### Buttons

- **Reset to Defaults** - Click this to reset to real-time values.
- **OK** - Click this to request the calculation for the selected feeders. Once the calculation is finished, the dialog will close and the data will be loaded to the **Feeder Load Overview Tab**.
- **Cancel** - Click this to exit the Study Session Parameters dialog.

## Requesting a New Feeder Load Management Calculation

To request a new Feeder Load Management Study Mode calculation, follow these steps:

1. Do one of the following to open the Study Session Parameters dialog:
  - In real-time mode, click the  button on the Feeder Load Management toolbar or select **Study Mode** from the Actions menu.
  - In study mode, click the  button on the Feeder Load Management toolbar or select **Study Session Parameters** from the Actions menu.
2. Complete the fields on the Study Session Parameters dialog.
3. Click the **Apply** button. The results of the calculation are displayed on the Feeder Load Management Overview Panel.
4. View other Feeder Load Management Window Panels for more information.

## Data Source and Data Quality

Possible sources of data for a feeder head are Default, SCADA, or Manual Entry. SCADA is considered to be the normal source; the other two are considered abnormal.

Possible values of data quality are:

- **Valid** – data is valid.
- **Suspect** – there are inconsistencies in the data that the system cannot reconcile, which indicates a possible misconfiguration of SCADA or model data.
- **Invalid** – the SCADA system has reported a measurement as being unusable.

A yellow background for a feeder name in Feeder Load Summary or Feeder Load Overview indicates that the feeder head data source or/and quality is abnormal.

Data source, quality, and alarm counts are not included in the Feeder Load Management table by default. To see this additional information, enable balloon details and then click a row in the table.

## Identifying Devices with SCADA Suspect and SCADA Non-Converged Results

After finding that a power flow will not solve due to a suspect SCADA data, you can use FLM to identify the devices that are returning bad data. You may identify the problem by viewing a device in the **Viewer** and seeing that the Power Flow will not solve or by seeing a Suspect SCADA feeder condition in the **Feeder Load Summary**, as shown below.

**Feeder Load Summary**

File Actions View Filter Help

Earliest Alarms Auto Filter Filter: All Sort: Feeder Condition (-)

Substation	Feeder	Phase	Util %	Amps	kV	Feeder Condition
SUB_Lake	2412	B	32	155	8.25	Suspect SCADA
SUB_Lake	24-1	A	34	125	40.73	Non-Converged SCADA
SUB_Lake	24-2	A	34	69	40.73	Non-Converged SCADA
			34	53	40.73	Non-Converged SCADA
			34	0	41.54	Non-Converged SCADA
			34	0	41.54	Non-Converged SCADA
			34	37	41	Non-Converged SCADA
			34	37	41	Non-Converged SCADA
SUB_Marlboro	2511	C	9	36	8.31	Non-Converged SCADA

**Phase A Phase B Phase C**  
**Source:** SCADA SCADA SCADA  
**Quality:** Suspect Suspect Suspect

1. Once you have opened FLM, notice the row with the Suspect SCADA condition.

**Feeder Load Management**

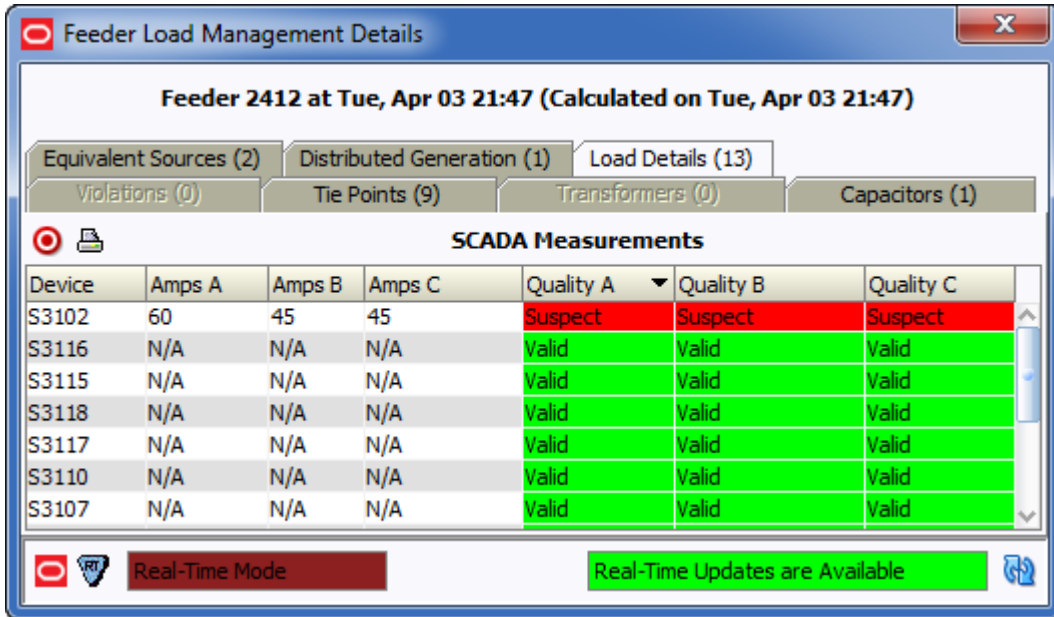
File Filter Actions Options Help

Graphical View Feeder Load Overview

Auto Filter All

Feeder	Amps A	Amps B	Amps C	kW A	kW B	kW C	kVAr	Feeder Condition	Quality A	Quality B	Quality C
2412	144	155	148	1117	1205	1148	1265	Suspect SCADA	Suspect	Suspect	Suspect
2412	144	141	134	1117	1090	1033	1210	Normal	Valid	Valid	Valid
2412	141	138	131	1096	1068	1012	1177	Normal	Valid	Valid	Valid
2412	138	134	128	1072	1044	989	1142	Normal	Valid	Valid	Valid
2412	134	130	124	1043	1015	962	1103	Normal	Valid	Valid	Valid
2412	130	126	120	1013	985	934	1063	Normal	Valid	Valid	Valid

2. Select the row and click the Feeder Load Management Details  button.



**Feeder Load Management Details**

**Feeder 2412 at Tue, Apr 03 21:47 (Calculated on Tue, Apr 03 21:47)**


Equivalent Sources (2) Distributed Generation (1) Load Details (13)

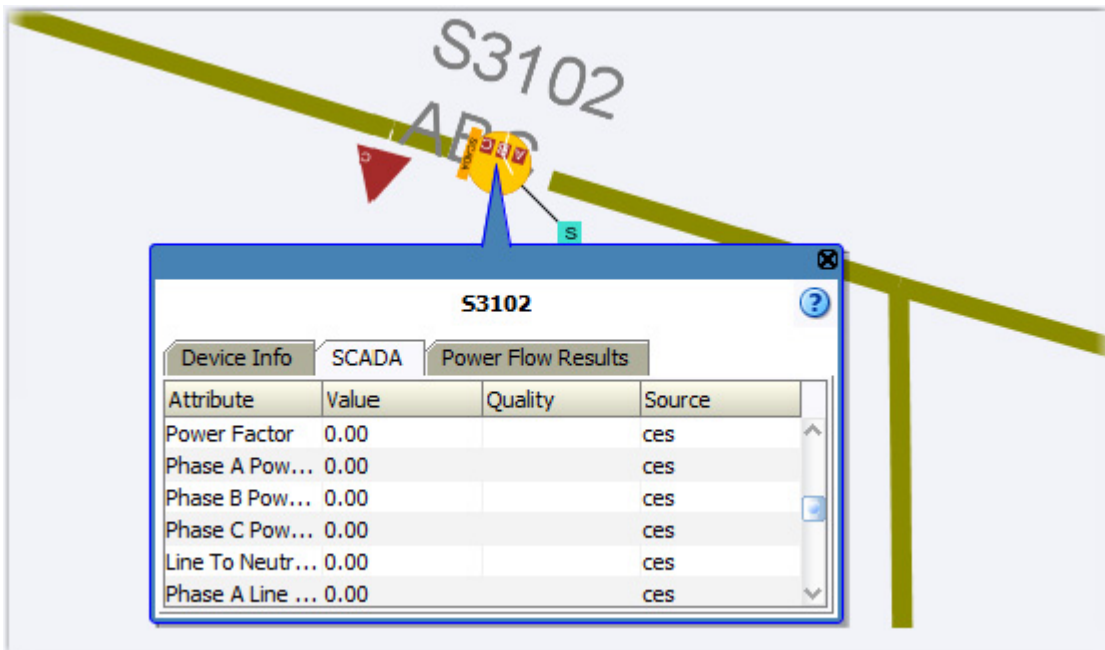
Violations (0) Tie Points (9) Transformers (0) Capacitors (1)

**SCADA Measurements**

Device	Amps A	Amps B	Amps C	Quality A	Quality B	Quality C
S3102	60	45	45	Suspect	Suspect	Suspect
S3116	N/A	N/A	N/A	Valid	Valid	Valid
S3115	N/A	N/A	N/A	Valid	Valid	Valid
S3118	N/A	N/A	N/A	Valid	Valid	Valid
S3117	N/A	N/A	N/A	Valid	Valid	Valid
S3110	N/A	N/A	N/A	Valid	Valid	Valid
S3107	N/A	N/A	N/A	Valid	Valid	Valid

Real-Time Mode Real-Time Updates are Available

3. Select a row with Suspect data and click the target button  to focus the Viewer on the device.



**S3102**

Device Info SCADA Power Flow Results

Attribute	Value	Quality	Source
Power Factor	0.00		ces
Phase A Pow...	0.00		ces
Phase B Pow...	0.00		ces
Phase C Pow...	0.00		ces
Line To Neutr...	0.00		ces
Phase A Line ...	0.00		ces

# Chapter 12

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## Fault Location, Isolation, and Service Restoration

This chapter describes the **Oracle Utilities Network Management System (NMS)** Fault location, Isolation, and Service Restoration (**FLISR**) functionality.

**Note:** The features described in this chapter are specific to the **FLISR** functionality. For information about the Fault Location Analysis (FLA) feature, see **Fault Location Analysis** on page 13-1.

This chapter includes the following topics:

- **Overview**
- **Setting the FLISR Mode**
- **Using FLISR with Work Agenda**
- **Using the FLISR Report Tool**
- **Viewing FLISR Disabled Devices**
- **Viewing FLISR Conditions**
- **Using the FLISR Flow Summary Window**

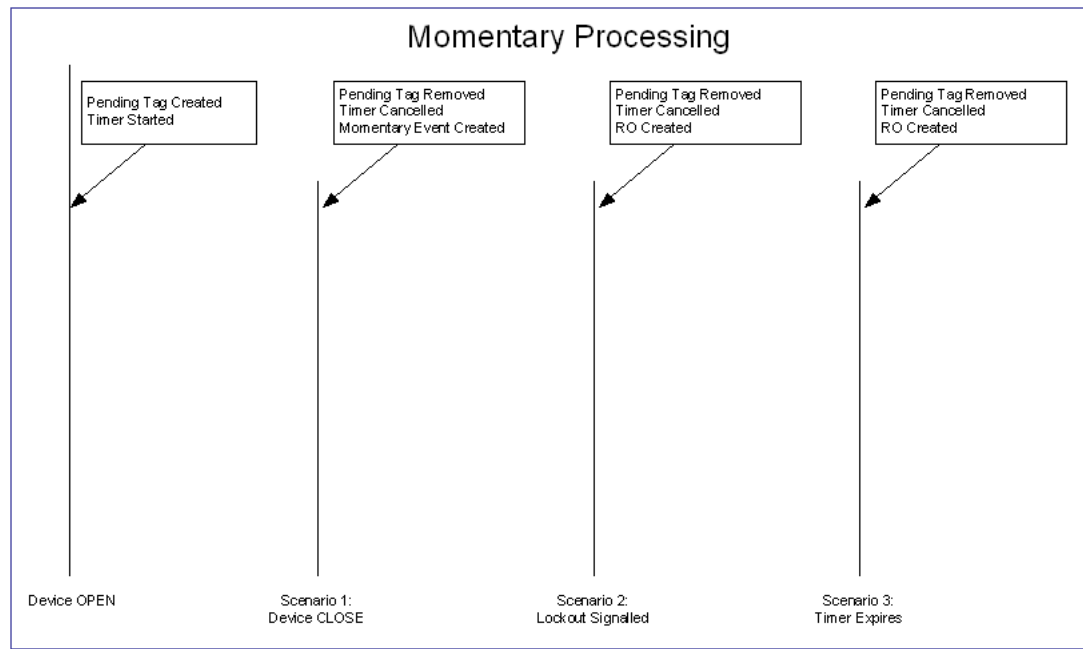
### Overview

**FLISR** responds to protection trips of SCADA monitored and controlled switches (*i.e.*, feeder circuit breakers (CB) and downstream reclosers (ACR)). **FLISR** automatically identifies the faulted section using the telemetered Protection Trip and Fault Indication flags and then (in Auto Mode) automatically schedules the isolation and restoration actions to restore the non-faulted areas de-energized by isolating the fault. In Manual Mode, **FLISR** will present the isolation and restoration actions for execution by the user. If **Oracle Utilities Network Management System Power Flow** is implemented, **FLISR** will use power flow analysis in the solution analysis.

The following figures show the sequence of events in a **FLISR** scenario.

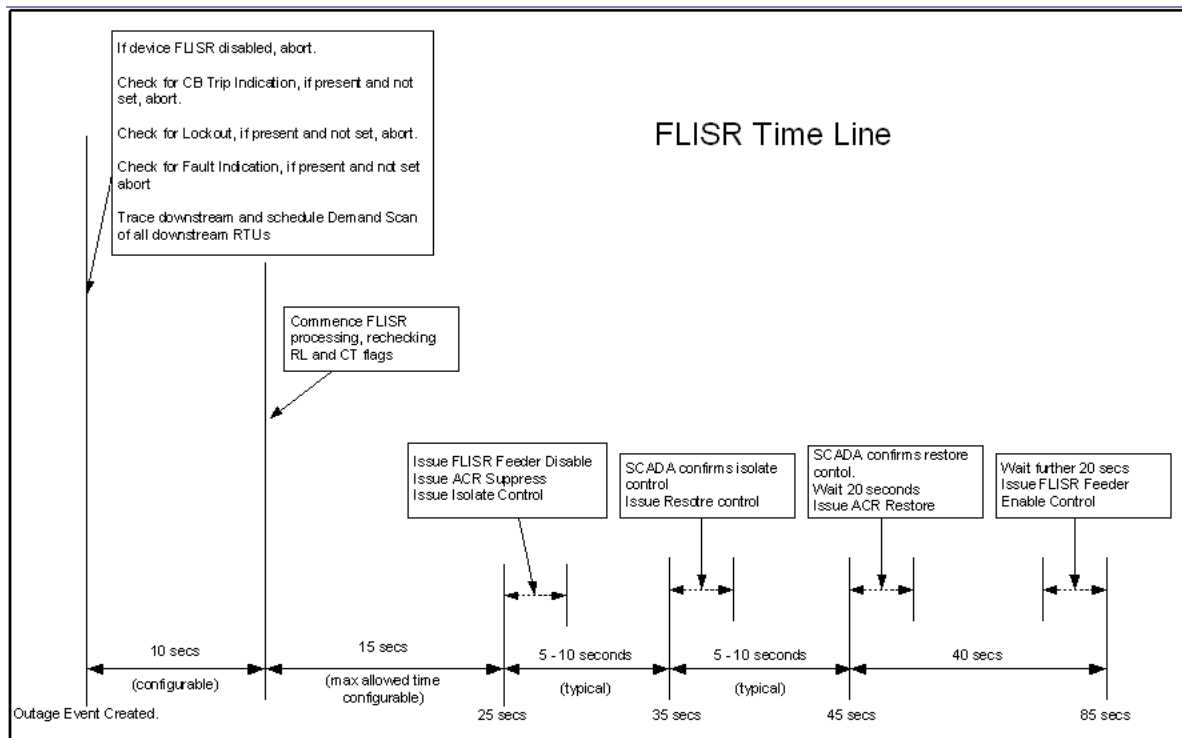
The first figure shows the various scenarios in the momentary processing. The scenarios are:

1. A breaker trips and is followed a short time later by a reclose operation.
2. A breaker trips and is followed by a recloser lockout.
3. A breaker trips but the device has no recloser lockout signal available. **FLISR** waits a configurable amount of time and, in the absence of a close operation, assumes lockout to have occurred.



**Note:** RO (Real Outage) is created only if customer supply nodes are de-energized as a result of the operation.

Once an RO is created, the **FLISR** processing sequence shown in the following figure is initiated.



The control sequence (starting at around 25 seconds) is only performed in automatic mode. In manual mode an operator must initiate the control sequence.

Timings in the above diagram are only indicative. Actual values will depend on the complexity of the solution required and the responsiveness of the isolate/restore controls sent to SCADA. The following timings are deterministic:



- The delay allowed for demand scans. This is configurable and defaults to 10 seconds.
- The maximum solution time allowed in automatic mode. This is configurable and defaults to 15 seconds. If the solution takes longer to solve than this time, **FLISR** will not automatically execute the control sequence. The option for an operator to manually initiate the control sequence is preserved.
- Maximum time allowed for automatic operations after the lockout is: Demand scan delay + maximum solution time. The default configuration is 25 seconds.
- Wait times for Recloser operations. These are 20 seconds.
- Any error conditions detected during process are logged in the Event Log.

## FLISR Blocking Conditions

**NMS** may be configured with conditions to block **FLISR** actions when present. Any **FLISR** regeneration plan that would include the condition will be excluded from automatic actions or from suggested restoration plans.

### Possible Blocking Scenarios

- Blocking could be set up for a type of safety document and then **FLISR** would skip any scenario that would operate a device that had been tagged with that type of safety document.
- Any device with a crew onsite could be blocked to protect the crew from an automatic device operation.

## Setting the FLISR Mode

**FLISR** supports three different modes of operation:

- **Disable** - Disables **FLISR** from calculating, generating or executing a restoration plan. **FLISR** still automatically performs disables/enables functions.
- **Manual** - Places **FLISR** in manual mode, where restoration plans are automatically generated but must be manually executed by the operator via a switching sheet generated from the **FLISR** Tool.
- **Automatic** - Places **FLISR** in Automatic Mode, which automatically generates and executes switching sheets.

To set the **FLISR** mode, select **FLISR Mode** from the Tools menu in Web Workspace with Web Switching Management, and then select the desired mode (Disable, Manual, or Automatic).

## Enabling and Disabling FLISR Devices from the Control Tool

You can enable or disable devices for **FLISR** actions by clicking the **Enable FLISR** or **Disable FLISR** buttons from the Control Tool. These buttons are displayed for all **FLISR** devices.

When a **FLISR** device is disabled, a condition flag is shown on the Viewer adjacent to the device.

**Note:** Disabling a Circuit Breaker or a Recloser will implicitly disable all downstream **FLISR** actions. Disabling a non-reclosing device (*i.e.*, a simple sectionalizer) will only disable the individual device.

## Using FLISR with Work Agenda

The Work Agenda is the starting point for viewing the status and results of the FLISR calculations. When row or cell coloring is enabled in the **Web Workspace** (see **Color Coding Options** on page 1-7), the background color of the “Event #” field in the Work Agenda indicates the FLISR status:

- **Yellow** - The job is currently being processed as a FLISR job and a solution is being searched for.
- **Green** - A FLISR solution has been found for the job.
- **Light Red** - A FLISR solution has been found but it overloads the restoring feeder – manual intervention will be required.
- **None** - Non-FLISR event or no FLISR solution can be found for this job.

## Using the FLISR Report Tool

The FLISR Report Tool summarizes the SCADA devices and their signals and the recommended restoration plans. To start the FLISR Report Tool:

- Select a FLISR event in the Web Workspace with Web Switching Management Work Agenda. Right-click the event and select **FLISR Report...** from the pop-up menu or select **FLISR Report...** from the Actions menu. The Fault Location, Isolation, and Service Restoration Tool window opens for the selected event.

**Note:** These options are only available if the selected event is a FLISR event.

The Fault Location, Isolation, and Service Restoration window opens, displaying the following information:

- **SCADA Measurements.** This summarizes the status of all FLISR devices downstream of the tripped device.
  - **Device Name** displays the alias of the device. Select the row that will allow you to “target” the isolation switch in the Viewer.
  - **Status** displays the tripped/closed status of all associated SCADA devices.
  - **Previous Amps** displays the pre-fault amps through the associated SCADA devices. This is calculated from the pre-fault MW and pre-fault MVA.
  - **Fault Indicator** displays the fault indication status of all associated SCADA devices.
  - **Lockout Status** displays the reclose lockout status of all associated SCADA devices.
  - **Previous MW** displays the pre-fault MW through all associated SCADA devices.
  - **Previous MVA** displays the pre-fault MVA through all associated SCADA devices.
  - **Quality** displays the relevant SCADA status of the associated SCADA device’s status, reclose lockout, fault indication, and analog signals.
- **FLISR Plans**
  - **Isolation Switch** displays the alias of the SCADA device used as the isolation point, in the FLISR-generated restoration plan.
  - **Pickup Amps** displays the expected amps (load) in the section ex??? the isolation switch, which is to be transferred to another feeder.
  - **Preferred Restore Option** allows you to select/deselect a FLISR restoration plan. This is displayed only if you are using FLISR with Switching Management. In FLISR with Web Switching Management, a checkbox appears to the right of the Isolation Switch column, which serves the same purpose.

- **Restore Switch** displays the alias of the SCADA device used as the restoration point in the FLISR-generated restoration plan.
- **Feeder** displays the feeder name to which supply is being transferred.
- **Before Fdr Amps** displays the amps on the feeder to which supply is being transferred.
- **After Fdr Amps** displays the expected amps (load) on the feeder to which supply is being transferred after the transfer.
- **Limit Device** displays the highest loaded limiting object type.
- **Expected Limit Object Amps** displays the expected highest loaded limiting object amps after the restoration. (This field is displayed in a balloon dialog if you are running FLISR for Web Workspace with Web Switching Management.)
- **% of Rating** displays load as a percentage of limiting object rating. (This field is displayed in a balloon dialog if you are running FLISR for Web Workspace with Web Switching Management.)

## FLISR Report Tool Menus and Toolbar

This section describes the toolbars and menu options available when you are running FLISR.

### File Menu

- The **Print** option prints the contents of the window.
- The **Exit** option exits the FLISR tool.

### Actions Menu

- The **Generate Switch Plan** option generates a switch plan for the selected isolate/restore sequences when FLISR is in Manual mode or when an overloaded plan is detected under Auto mode.
- The **Enable Balloon Details** option toggles the balloon details on and off. When enabled, a balloon dialog displays details about the selected item. For Limit Devices, the balloon dialog displays the Limit Device Amps,% of Rating, and Margin.

### Options Menu Actions

These options are displayed when you right-click a row in the FLISR Report tool.

- **View...** displays (focuses) the Viewer on the selected device.
- **SCADA Summary...** displays the SCADA Summary window for the selected row in the SCADA Measurements table.
- **Flow Summary...** opens the FLISR Flow Summary. This option is only available when a row is selected in the FLISR Plans list.
- **View Isolate Switch...** focuses the Viewer on the affected feeders for the selected isolate sequences. This option is only available for the selected row's isolation switch.
- **View Restore Switch...** focuses the Viewer on the affected feeders for the selected restore sequences. This option is only available for the selected row's restoration switch.
- **View Limit Device...** focuses the Viewer on the highest expected limiting device for the selected restore sequence.

## Related Topics

- **Executing FLISR in Automatic Mode**
- **Generating a Switch Plan with FLISR in Manual Mode**

- **Setting the FLISR Mode**
- **Viewing FLISR Disabled Devices**
- **Viewing FLISR Conditions**
- **Using the FLISR Flow Summary Window**

## Executing FLISR in Automatic Mode

In Automatic mode, FLISR can create and execute a switch plan without operator intervention as follows:

1. A fault occurs and a section is isolated.
2. FLISR completes its analysis and produces its solutions.
3. FLISR selects the best combination, based on a set of rules such as preferring to restore load to the same Zone Substation and avoiding overloads.
4. FLISR creates a plan and executes all steps in the plan automatically.
5. An operator can view the plan during and after execution. If the switching sheet is called up during the automatic execution, it will have been placed in View Only mode. The switching sheet may be manually augmented with additional steps after the automatic execution has completed. The switching sheet will behave like a normal Fault switching sheet after the FLISR generated steps are completed or have failed (after it is taken out of View Only mode).

After FLISR calculations have been made, the corresponding switching sheet may be called up from the **Switching...** option in the Work Agenda. It is possible that when you call the switching sheet up you will see the switching sheet still executing.

## FLISR Automatic Mode with Overloads

FLISR automatic mode with overloads works as follows:

1. A fault occurs and a section is isolated.
2. FLISR completes its analysis and produces its solutions. One of the preferred restoration scenarios includes overloading the restoration feeder.
3. FLISR selects alternate restoration scenarios. This might mean skipping a preferred feeder to avoid the overloads and selecting a different feeder that has more capacity.
4. A plan is created and all steps in the plan are executed.
5. An operator can view the plan during and after execution as described above.

## Generating a Switch Plan for the Overload Case

In the case where the restoration plan would result in overloads either in the restoring feeder or the section being transferred, the user must apply an override to generate the Switch Plan.

The checkbox must be selected for the plan you want to use. The system prompts you for confirmation. In automatic mode, plans with overloads are not executed automatically and must be run by the user in manually (from the switching sheet via the **Execute FLISR Steps** action).

## Generating a Switch Plan with FLISR in Manual Mode

In manual mode, you can generate a switching sheet from the FLISR tool and then execute the steps in Web Switching Management.

Here's how the process works:

1. A fault occurs and a section is isolated.
2. FLISR completes its analysis and produces its solutions.
3. The operator inspects the FLISR solutions and either accepts the default scenarios or decides to adjust the scenarios.
4. The operator instructs FLISR to generate the plan.
5. The operator reviews the plan.
6. The operator can choose to do one of the following:
  - Instruct, Complete and/or fail each step manually, or
  - Choose to let FLISR execute all steps in the plan.

### Generating the Switch Plan

To generate the switching sheet from the Fault Location, Isolation, and Service Restoration window, follow these steps:

1. In the FLISR Plans table, click the checkbox for the plans you want to generate. (The checkbox appears in the column to the right of the Isolate Switch column.)
2. Click the **Generate Switch Plan** toolbar button or select **Generate Switch Plan** from the Actions menu. The FLISR Event to Sheet List dialog opens.
3. Click the **Generate Switch Plan** button. The switching sheet is displayed, with the switch steps already inserted.
 

**Note:** If there is an existing sheet already associated with this FLISR outage, the FLISR Event to Sheet List dialog opens. Choose a sheet from the list. Indicate whether the steps should be appended to the existing plan and whether the existing sheet should be overwritten. The switching sheet will be displayed with the FLISR-generated steps, based on the options selected.
4. From the Switching Sheet Editor window, choose one of the following options on the **Action** menu.
  - **Execute FLISR Steps** - Executes all FLISR switch steps after prompting for confirmation. Note that separate isolation/restoration sequences will be executed in parallel.
  - **Clear FLISR Conditions** - Clears the FLISR operated Flags from the Viewer for this Switching Sheet.

## Viewing FLISR Conditions

FLISR Conditions (i.e., **FLISR** Actions and **FLISR** Disabled Devices) are listed in the **Condition Summaries**, which is accessed from the Web Workspace with Web Switching Management Tools menu. See **Condition Summaries** on page 1-79 for additional details on the Condition Summaries window.

### Viewing FLISR Actions

To view all **FLISR** Actions, select **FLISR Actions** from the Condition Summaries Filter menu. The FLISR See **Condition Summaries** on page 1-79 for more information.

### Viewing FLISR Disabled Devices

The system allows you to view devices that have been individually disabled from FLISR operations. There are several scenarios for disabling FLISR on a device.

- Devices can be enabled/disabled through actions on the device's control tool
- Disabling a circuit breaker (and/or recloser) automatically disables all downstream devices along a radial feeder. Each device is checked during FLISR execution for upstream disabled breakers or reclosers.
- Disabling a sectionalizer disables just the individual device.
- Suppressing reclose features of a recloser or circuit breaker will also disable FLISR on the device.
- An explicit FLISR Disable SCADA point can be mapped to a device. When set (typically through a SCADA calculated point), FLISR will be disabled on that device.
- A device can be disabled in multiple fashions; only when all disabling conditions are removed will the device become active again.
- A device can only be enabled by removing the corresponding disabling constraint. For example it is not possible to manually enable a device that has been automatically disabled due to reclose suppression.
- Disabled devices are marked with a "FLISR Disabled" condition, shown in the Viewer, and summarized in the Condition Summaries window with the FLISR Disabled filter.

## Using the FLISR Flow Summary Window

The FLISR Flow Summary window displays the calculated flows in the restoration path and in the de-energized section that will be transferred.

To open this window, right-click a row in the FLISR Plans section of the Fault Location, Isolation, and Service Restoration window, then select **Flow Summary...** from the pop-up menu.

The Flow Summary window displays the following fields and buttons:

- **Device Name** is the alias of the object in the restoration path or de-energized section.
- **Device Type** is object type: Cond = conductor, Switch = switch, Fuse = fuse.
- **Amps Flow A/B/C** is the flow in amps through the object.
- **Amp Limit A/B/C** is the limit in amps for the object.
- **Largest % Usage** is the expected load flow through the object as a percentage of the object's rating.
- **Smallest Margin** is the available capacity in amps for the object.
- **kV** is the kV on the branch.
- **Low Limit** is the low kV limit.

- **High Limit** is the high kV limit.
- **% Nominal** is the percentage of nominal voltage that branch is being run at.
- **Violation Type** is type of violation, if any, on the branch. The violation type drives the coloring of the device name column. Devices that violations are colored red. Devices that have warnings are colored yellow. Devices that have neither violations nor warnings are colored green.
- **Restored Device** is set to 'Y' if the object is part of the faulted (de-energized) feeder or 'N' if it is part of the restoring feeder.
- The **Focus** toolbar button displays the branch flow in the Viewer, with the selected object flashing.

## Related Topics

- [Using FLISR with Work Agenda](#)
- [Executing FLISR in Automatic Mode](#)
- [Generating a Switch Plan with FLISR in Manual Mode](#)
- [Setting the FLISR Mode](#)
- [Viewing FLISR Disabled Devices](#)
- [Viewing FLISR Conditions](#)





# Chapter 13

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## Fault Location Analysis

Oracle Utilities Network Management System's Fault Location Analysis (FLA) uses fault-related SCADA measurements to identify probable fault locations. This information can be used to dispatch crews to targeted locations, thus shortening outage duration and restoration time.

**Note:** Fault Location Analysis is only available if your system supports SCADA extensions.

This chapter covers the following topics:

- **Fault Location Process Overview**
- **Using Fault Location Analysis**

### Fault Location Process Overview

The Fault Location process is as follows:

- When the system receives a message of a fault occurrence, the FLA automatically retrieves fault information from relays and fault indicators (if available) and logs a new event in the Work Agenda.
- FLA uses fault information and circuit parameters to calculate potential fault locations for fault events. Potential fault locations are displayed in the Viewer.
- When the FLA tool is started, it displays analysis details about fault events, including SCADA measurements and probable fault locations.
- If more than one fault location is identified for a specific fault event, the user may have to correct a calculated fault location after the actual fault location is identified by crew members on site.
- Optionally, the user may change one or more analysis parameters and then have FLA recalculate the fault locations using the modified parameters. The user can confirm or clear (discard) calculated fault locations as appropriate.

## Fault Location Algorithm

The algorithms used by FLA are different from those used for a regular short-circuit analysis. When performing a short-circuit analysis, where you are determining fault currents, you have more information since you know where the fault is. In that case, the model is solved with a known fault type at a known location. The fault currents at the target location are determined by the source voltage, source impedance, and all conductor impedances along the path to the fault.

With FLA, only the fault currents at the breaker are known and the fault location must be extrapolated. The short-circuit analysis is performed with the fault placed at the breaker and the fault currents determined for that scenario. These should be higher than the fault currents reported by SCADA. For example, if SCADA is reporting 2500 Amps at the breaker and the solution is reporting 3000 Amps, we know that there is more impedance in the path to the fault that would account for the 500 Amps difference. We calculate the impedance that would cause the difference and trace down the feeder summing up conductor impedances until we arrive at a location that equates to the target impedance.

One significant difference between the two scenarios is that by placing the fault at the breaker, we are removing all downstream load from consideration. Whereas in FLA the fault is actually downstream, so the breaker fault currents will have a component that is for the load that is between the breaker and the fault. The assumption that is made is that that component is insignificant; however, in reality, the further down the feeder the FLA fault is, the more significant that component becomes. This may or may not have a significant impact on the results because the fault will pull down the breaker voltage.

## Using Fault Location Analysis

Fault Location Analysis displays possible fault locations and the SCADA data involved in the Fault Location analysis. This tool also allows you to change one or more analysis parameters and recompute fault locations. Finally, you can use the tool to confirm or discard calculated locations.

This section includes the following topics:

- **Understanding Fault Events in the Work Agenda**
- **Using the Fault Location Analysis Tool**
- **Confirming Fault Locations**
- **Marking Fault Locations as Incorrect**
- **Correcting a Fault Location**

## Understanding Fault Events in the Work Agenda

When the system receives a message of a fault occurrence, the FLA automatically retrieves fault information from relays and fault indicators (if available) and logs a new event in the Work Agenda. The Work Agenda fault event provides the following information:

- The **Status** column displays “F-NEW.”
- The **# Out** column (number of customers experiencing outage) is 0.
- The **Evt Type** is “FAULT.”
- The **Pred Type** is “Revised Prediction.”
- No phases are listed as out.
- All device-related fields, such as the control zone information, appear as they would for any other event.



You can treat the event like you would other event types in the Work Agenda (*e.g.*, acknowledge, assign crews, etc.). In addition, the Work Agenda allows you to start the FLA tool when a fault

event row is selected by selecting Fault Location Analysis... from either the Work Agenda Actions menu or the right-click options menu.

## Using the Fault Location Analysis Tool

The Fault Location Analysis window displays possible fault locations and the SCADA data involved in the Fault Location analysis.

### File Menu and Toolbar Options

- To print the Fault Location Analysis information, click the  button on the toolbar or choose **Print** from the File menu.
- To close the Fault Location Analysis window, click the  button on the toolbar or choose **Exit** from the File menu.

The Fault Location Analysis window displays two sections:

- The **SCADA Measurements** section displays fault-related SCADA measurements used to identify probable fault locations.
- The **Possible Fault Locations** section displays the list of devices identified by the Fault Location Analysis tool as possible fault locations. If no valid fault locations are found, a single “Undetermined Fault” record is listed.

### SCADA Measurements Section

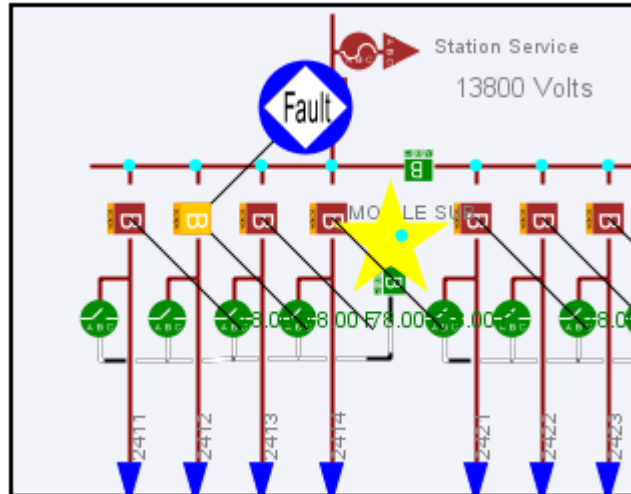
#### Table Data

- The **Device** column contains the name of the device reporting the SCADA measurements.
- The **Status** column contains the status of the device.
- The **Fault Ind** column contains the fault indicator (Yes or No).
- The **Lockout Ind** column contains the lockout indicator (Yes, No, or N/A).
- The **Qual** column contains Quality codes for the measurement that indicate the quality of the SCADA measurement (*e.g.*, out of scan, inhibited, manual override). Several quality codes can be listed.
- The **Amps** columns contain the calculated current flow from the source.

## Options Menu

If you right-click to select a row in the SCADA Measurements section, the options menu displays the following options:

- **SCADA Summary...** - Launches the SCADA Summary filtered for the selected device.
- **View...** - Displays the device in the Viewer.



## Possible Fault Locations Section

### Table Data

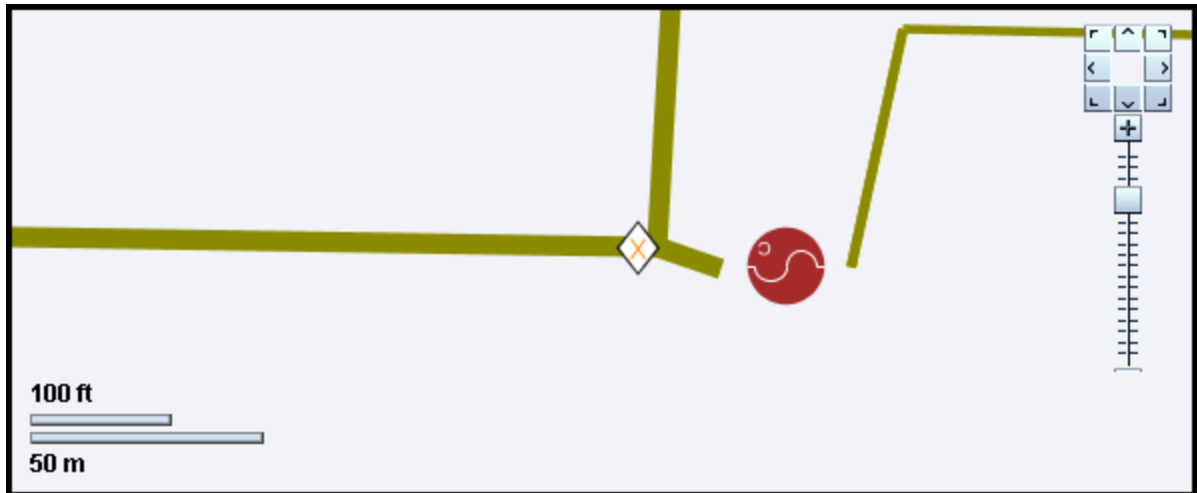
- The **Status** column contains the status of the fault location: Possible Fault, Confirmed Fault-Out, or Fault Incorrect.
- The **Fault Type** column contains the fault type: Phase A to Ground, Phase A to Phase C, etc.
- The **Fault Device** column contains the fault device name.
- The **Phases** column contains the faulted phases.
- The **Location** column contains distance from the device to the upstream switch.
- The **GPS (X,Y)** column contains the X,Y coordinates of the predicted fault.

### Options Menu

If you right-click to select a row in the Possible Fault Locations section, the options menu displays the following options:

- **Confirm Fault** - Marks the device as Confirmed and marks all other devices in the list as Incorrect (not the correct fault location).
- **Mark Incorrect** - Marks the devices as Incorrect (not the correct fault location).
- **Correct Fault...** - Displays the Correct Fault Location window, which allows you to manually edit the fault location. See **Correcting a Fault Location** on page 13-5.

- **View...** - Displays the selected device in the Viewer.



## Confirming Fault Locations

To confirm a fault location:

1. Select the device you want to confirm from the Possible Fault Location section on the Fault Location Analysis window. (See **Using the Fault Location Analysis Tool** on page 13-3.)
2. Click the right mouse button and select **Confirm Fault** from the pop-up menu. The selected device is marked as Confirmed and all other devices in the list are marked as Incorrect.

The Confirmed Fault changes from  to  in the Viewer. The other Incorrect faults disappear from the Viewer.

## Marking Fault Locations as Incorrect

To mark a possible fault location as incorrect:

1. Select the device you want to mark as incorrect from the Possible Fault Location section on the Fault Location Analysis window. (See **Using the Fault Location Analysis Tool** on page 13-3.)
2. Click the right mouse button and select **Mark Incorrect** from the pop-up menu. The selected device is marked as Incorrect and disappears from the Viewer.

## Correcting a Fault Location


If none of the possible fault locations is correct, you can select the closest one and then correct the fault location details. The system creates a new fault location with the corrected information.

To correct a fault location:

1. Select the closest fault location from the Possible Fault Location section on the Fault Location Analysis window. (See **Using the Fault Location Analysis Tool** on page 13-3.)
2. Click the right mouse button and select **Correct Fault...** from the pop-up menu. The Correct Fault Location window is displayed. The Status of the new fault location is set to Corrected Fault and is not editable.

3. Enter the correct values for the following fields:
  - **Fault Type** - The specific fault type, such as Phase A to Ground or Phase C to Phase A.
  - **Fault Device** - The faulted object. This is the device alias for the conductor selected in the Viewer.
  - **Distance** - The distance to the referenced device.

**Note:** The reference device field populates with the first upstream switch. The Change Reference Device button enables. The system automatically displays the first upstream switch for the selected fault device. You can reference a different device by selecting the device in the Viewer and then clicking the

**Change Reference Device** button (  ) on the Correct Fault Location dialog. The system populates the Reference Device field with the selected device. Click **OK** to accept this device or click **Cancel** if this is not the correct device.

- **Description** - A brief description of the fault. This text will be displayed in a balloon dialog on the Possible Fault Locations table for Corrected Fault rows.
4. Click **OK**. All existing fault locations are flagged as incorrect, and a new location is added that matches your entries.

A new fault location symbol appears in the Viewer at the location indicated by the Distance and Reference Device fields. Any existing fault location symbols in the Viewer are removed.

# Chapter 3

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## Model Management

This chapter describes how to manage changes to your system data model.

**Note:** For complete information about configuring, validating, and testing the data model, see “Building the System Data Model” in the Oracle Utilities Network Management System Configuration Guide.

This chapter includes the following topics:

- **Overview**
- **Logging In**
- **Using the Model Management Window**
- **Model Management Actions**

### Overview

Model Management is a tool for managing changes to your system model. The process of extracting updates from the GIS and updating the model is unique for each company. Typically, model updates are handled by a set of scripts that run automatically on a regular schedule. If there are problems in the update process, the model administrator can use the Model Management tool to identify and resolve the problems and then re-apply the model updates.

The following describes the model update process and introduces several terms that are used in this chapter:

- **GIS Data Extraction** is the customer-specific process by which data is extracted from the GIS to Oracle’s vendor-neutral model preprocessor (MP) file format.
- MP files must be **preprocessed** before they can be built into the model. Preprocessing converts the MP files into the .mb file format required by the Model Builder.
- A set of transactions (.mb files), collectively referred to as a **patch**, are submitted to the Model Builder for processing. Patches are applied to or built into the core operations model.
- The **Model Builder (MBSERVICE)** processes the .mb files, saves the information into the Oracle Utilities Network Management System Operations Model RDBMS, and writes out a set of **maps**, which are used by the Viewer to display portions of the system model.
- If any problems arise during preprocessing or model building, you can use the Model Management tool to perform the following tasks:
  - Identify maps that need to be built (referred to as pending maps)
  - View a list of recent patches and their statuses
  - Display all patches that were applied to a particular map

- Rebuild individual maps or run a full model build
- Run the post process script
- View the Preprocessor Log, the Patch Build Log, and the Patch Build Report
- Enable or disable model build reporting
- Delete an import file to be rebuilt.

## Logging In

To log in to Model Management, complete these steps:

1. Depending on how your system was installed, do one of the following:
  - Click the **Model Management** icon found under the appropriate program group in your Windows Start Menu.
  - Double-click the **Model Management** icon on your desktop.
  - Open a web browser and type the Model Management URL in the browser's address field.

The Model Management Login window displays.

2. Enter your user name in the User Name field.
3. Enter your password in the Password field.
4. Click the **Validate** button. The bottom portion of the Login window sensitizes.
5. Select the appropriate User Type from the drop-down menu.
6. Click the **Login** button. Upon successful login, the Model Management window opens.

## Using the Model Management Window

The Model Management window displays the following information:

- **Pending Map Section**
- **Patches Section**
- **Menu and Toolbar Options**
- **Status Bar**

Model Management actions include:

- **Displaying the Map History**
- **Displaying the Preprocessor Log**
- **Building Maps**
- **Rebuilding a Patch**
- **Displaying the Patch Build Log**
- **Displaying the Patch Build Report**
- **Enabling and Disabling Model Building**



## Pending Map Section

The **Pending Maps** section lists all maps that need to be built. This section displays the following columns:

- **Order** displays the order that the maps will be built. The value is returned by the `<project>_maps_to_build.ces` script.
- **Map Name** displays the name of the model map.
- The **Pending Actions** column displays one of the following:
  - **To be preprocessed:** The updates have not been preprocessed. Updates must be preprocessed into .mb files before they can be built into the model.
  - **To be committed:** The updates were preprocessed into .mb files, but have not been committed (built into the model).
- The **Last Build Status** displays the status of the last attempt to build the map. Statuses are:
  - **New:** No attempt has yet been made to complete the pending action.
  - **Failed submit:** The patch was submitted to the Model Builder but the map could not be built. See **Rebuilding a Patch** on page 14-6 for details on correcting this problem.
  - **Failed commit:** The patch was submitted to the Model Builder but the map could not be committed due to a dynamic data error. See **Rebuilding a Patch** on page 14-6 for details on correcting this problem.
  - **In progress:** The pending action is currently in progress.

## Patches Section







The **Patches** section lists all patches for the last 24 hours. To see patches for another time period, change the beginning and ending dates above the list as desired, then click the **Refresh** button.

The Patches section displays the following columns:

- The **Patch** column displays the patch number. The system assigns a number to a patch when it is submitted.
- **Map Name(s)** displays the name of the model map(s).
- **Creation Date** displays the date the patch was created.
- **Commit Date** displays the date the patch was submitted to the Model Builder.
- **Build Status** displays the status of the patch submission. Statuses are:
  - **Successful** - The patch was successfully applied and the model was updated.
  - **Failed Submit** - The patch was submitted to the Model Builder, but the map could not be built. See **Rebuilding a Patch** on page 14-6 for details on correcting this problem.
  - **Failed commit** - The patch was submitted to the Model Builder, but the map could not be committed due to a dynamic data error. See **Rebuilding a Patch** on page 14-6 for details on correcting this problem.
  - **In Progress** - The patch is currently being processed by the Model Builder. The map file(s) are either being parsed, being applied, or being committed to the database.

## Menu and Toolbar Options



The Model Management menu bar provides access to commonly used functions. Most of the functions in the Actions menu are also available on the toolbar. The toolbar icon is shown next to the menu option in the following list.

- **File Menu**
  -  **Print** - Lets you print the contents of the Model Management window.
- **Actions Menu**
  -  **Refresh** - Refreshes both the Pending Maps and Patches lists.
  -  **Halt Model Build** - Stops all model build activity. See **Enabling and Disabling Model Building** on page 14-6 for more information.
  -  **Enable Model Build** - Enables model building activity that was previously halted.
  - **Run Full Model Build** - Rebuilds the entire system model, not just individual maps.
  -  **Run Post Process** - Runs the post-processing script. Post processing takes place after maps are built. The default post-processing script performs a recompute and recache of the control zones in DDService, but this can be modified to perform various tasks, such as generating control zones or computing EE details from the model.
  - **Enable Model Build Reporting** - Enables or disables model build reporting. The Model Build Report lists all objects that were modified when a particular patch was applied. If enabled, a checkmark appears next to the menu option.
  -  **Build Map** - Prompts you to enter one or more map names and then rebuilds the specified maps. If you are entering multiple map names, separate names with spaces, as shown below:

Landbase\_49132336 Primary\_49132336

## Status Bar

The status bar displays the following information:

- **Maps to Build** - The total number of maps that need to be built. These maps are displayed in the Pending Maps section of the screen.
- **Failed Map** - The total number of maps that could not be built (were submitted and failed).
- **Model Build Status:**
  - **Enabled** - Model building is currently enabled. To disable, click  **Halt Model Build**.
  - **Halted** - Model building has been halted. To re-enable, click  **Enable Model Build**.
  - **In Progress** - A model build is currently in progress.

# Model Management Actions

You can perform the following actions from the Model Management window:

- **Displaying the Map History**
- **Displaying the Preprocessor Log**
- **Building Maps**
- **Rebuilding a Patch**
- **Displaying the Patch Build Log**
- **Displaying the Patch Build Report**
- **Enabling and Disabling Model Building**

## Displaying the Map History

To view a list of all patches that affect a particular map, follow these steps:

1. Select a map from the Pending Maps list on the Model Management window.
2. Right-click and select **Map History** from the pop-up menu. The Map History dialog opens. The columns on this dialog match the columns in the Patches list on the Model Management window.
3. Filter the list as desired by typing the target text in the filter boxes at the top of each column.
4. To take action on an item in the list, right-click the item and then select one of the following options from the pop-up menu:
  - **Rebuild Patch**
  - **Patch Build Log**
  - **Patch Build Report**

## Displaying the Preprocessor Log

The preprocessor log displays information and warnings generated during preprocessing. Follow these steps to display the preprocessor log file associated with a map:

1. Select a map from the Pending Maps list on the Model Management window.
2. Right-click and select **Preprocessor Log** from the pop-up menu. The preprocessor log opens.

## Building Maps

To build one or more pending maps, follow these steps:

1. Select the map you want to build from the Pending Maps list on the Model Management window.
2. Right-click and select **Build Map(s)** from the pop-up menu. The system builds the selected map and displays the results in the Result dialog.
3. Review the results and then click **Close**.
4. Click the **Refresh** button on the toolbar. If the build was successful, the map is removed from the Pending Maps list and a new row is displayed in the Patches list for this map.

## Rebuilding a Patch

To rebuild a patch, follow these steps:

1. Select a patch from the Patches list on the Model Management window.
2. Right-click and select **Rebuild Patch** from the pop-up menu. The results of the rebuild process are displayed in the Results dialog.
3. Review the results, and then click **Close**.
4. Click the **Refresh** button on the toolbar. A new row is displayed in the Patches list for this patch.

## Displaying the Patch Build Log

The Patch Build Log displays information and warnings generated during the build process. To display the log for a specific a patch build, follow these steps:

1. Select a patch from the Patches list on the Model Management window.
2. Right-click and select **Patch Build Log...** from the pop-up menu. The log entries are displayed in the Patch Build Log dialog.
3. Click **Close** to exit.

## Displaying the Patch Build Report

The Patch Build Report contains a list of all objects that were modified when a particular patch was built.


**Note:** The Patch Build Report is only generated if Model Build Reporting is enabled at the time the patch was built. Use the **Enable Model Build Reporting** option on the Actions menu to enable or disable Model Build Reporting.

To display the build report associated with a patch, follow these steps:

1. Select a patch from the Patches list on the Model Management window.
2. Right-click and select **Patch Build Report...** from the pop-up menu. The Patch Build Report dialog is displayed.
3. Review the report, and then click **Close**.

## Enabling and Disabling Model Building

You can temporarily suspend all model building activity if needed. This is useful if, for example, a major storm causes widespread outages. By halting model builds, you can lighten the load on the system while it manages the outages. When storm damage has been repaired, you can resume model building.

To stop model building, select **Halt Model Build** from the Actions menu or click the  toolbar icon.

To resume model building, select **Enable Model Build** from the Actions menu or click the  toolbar icon.

# Chapter 15

## Topology Validation Viewer

The Topology Validation Viewer displays reports of a number of different common problem areas with a data model, such as deenergized supply points, loops, and faulted areas.

This chapter includes the following topics:

- **Topology Validation Viewer Window**
- **Running a Topology Validation Report**

### Topology Validation Viewer Window


The Topology Validation Viewer displays reports in separate tabs and has a dynamic status bar that changes to show the time a particular report was run and the total number of instances found.

The status bar also includes a combo box where you can choose whether the tool displays reports run for the current model or for the nominal model. As you change that selection, the tool repopulates with reports that match your selection.

### Menus and Toolbar Options



#### File Menu

The following table describes the File Menu options.

Option	Description
 Print...	Opens the Print dialog, which allows you to print the currently selected report.
Exit	Closes the Topology Validation Viewer window.

## Action Menu

The following table describes the Action Menu options.

Option	Description
 Run Validation...	Opens the Run Validation dialog, which allows you to choose the reports to run and select criteria for them.
 Refresh	Reloads all reports.


## Help Menu

The following table describes the Help Menu options.

Option	Description
Topology Validation Viewer Help	Opens the Oracle Utilities Network Management System's online help content for the Topology Validation Viewer.

# Running a Topology Validation Report

To run new reports, do the following:

1. Click the **Run Validation...**  button to display the **Run Validation** dialog.
2. Choose the options you wish to use for your report:
  - a. **Model:**
    - **Nominal:** run the report against the nominal model.
    - **Current:** run the report against the current model.
  - b. **De-Energization Objects:**
    - **All:** show all de-energized branches
    - **Conductors:** show only de-energized conductors.
    - **Transformers:** show only de-energized transformers.
3. In **Run Reports**, select the reports to run:
  - a. **De-Energization:** show all de-energized supply\_nodes.
  - b. **De-Energized Supply Nodes:** show de-energized supply\_nodes.
  - c. **Loops/Parallels:** show loop/parallel objects.
  - d. **Cross Phase:** show cross-phase objects.
  - e. **Mesh ID Groups:** show Mesh ID groups of more than 3 MIDs.
  - f. **Feeder ID Groups:** show Feeder ID groups of more than 2 FIDs.
  - g. **ATO Groups:** show all ATOs below an FID.
  - h. **Islands:** show the size of all islands.
  - i. **Faults:** show all faulted objects.
  - j. **Partially Closed:** show all partially closed objects.

Refresh the tool using Refresh to load the new reports as they finish.

# Chapter 16

## Redliner

Redliner provides tools for the capture, annotation, emailing and saving of images. You can use these tools to document and collaborate on Oracle Utilities Network Management System and other related screens. You can save screen captures as JPEG files that may be marked-up, commented upon, or distributed via email. You can also use Redliner for sending detailed information to other work groups including customer service centers, marketing, media relations, and technical support.

This chapter includes the following topics:

- **Redliner Window**
- **Working with Images**

## Redliner Window

The Redliner main window is used to capture and annotate images. You can perform other actions in the window using the menu or buttons on the toolbar. You will initially access Redliner through a desktop shortcut or from your computer's Start menu.

### Menus

There are three menus on the Redliner menu bar: File, Action, and Help.

### File Menu

The following table describes the File Menu options.

Option	Description
New	Refreshes the transparent image window by taking a new screen capture and clearing any user edits.
Save...	Opens the Save JPEG image dialog, which allows you to save the current image as a JPEG file.
Print...	Opens the Print dialog, which allows you to print the image.
Email...	Opens the Redliner Email dialog, which allows you to email the image as an attachment.
Exit	Closes the Redliner window.

## Action Menu

The following table describes the Action Menu options.

Option	Description
Refresh	Refreshes the transparent image window by taking a new screen capture and clearing any user edits.
Email Settings...	Opens the Redliner Preferences dialog, which allows you to enter email settings such as SMTP Server, Display Name, Reply to Address, etc.

## Help Menu

The following table describes the Help Menu options.

Option	Description
Redliner Help	Opens the Oracle Utilities Network Management System's online help content for Redliner.
About...	Opens a dialog that displays information regarding what application is present running.

## Toolbar

The Redliner toolbar provides a shortcut to many of the options available from the Redliner menus. The toolbar appears below the menu bar.

The following table describes the buttons on the Redliner Toolbar.

Button	Description
Draw	Allows user to draw in the transparent image window. Note that this toggle button is mutually exclusive with the <b>Insert Text</b> button.
Insert Text	Allows user to insert text into the transparent image window by opening up the Insert Text dialog. Note that this toggle button is mutually exclusive with the <b>Draw</b> button.
Change Color	Opens the Select Color dialog, which allows you to select a color to use.

## Status Bar

The status bar appears at the bottom of the Redliner window, providing operating details for the application.

- The left-most field displays the locked/unlocked status of the image in the transparent image window.
- The center field displays whether Redliner is in drawing or text edit mode.
- The right-most field displays the current color selection.



## Working with Images

This section describes how to work with images using Redliner. It includes the following topics:

- **Capturing an Image**
- **Annotating an Image**
- **Saving an Image**
- **Emailing an Image**
- **Printing an Image**

### Capturing an Image

The Redliner transparent image window captures your screen at and refreshes when resized and repositioned to reflect the windows, desktop, and images behind the tool. The window can be resized and repositioned infinitely in order to capture the exact image needed.

Once the image has been edited, however, the image becomes locked, and repositioning and resizing will not change the image. The locked/unlocked status is always indicated on the Redliner status bar.

To reset the image capture and remove any editing you have performed, select the **File->New** or **Action->Refresh**.

### Annotating an Image

The options on the Redliner toolbar are used to annotate a captured image.

- Use the **Draw** button to draw freehand on the image.
- Use the **Insert** button to type text on the image.
- Use the **Change Color** button to select which color to use with the Draw and Insert Text options.

#### Drawing

To draw on a Redliner captured image, complete these steps:

1. Click the **Draw** button on the toolbar.
2. Click and hold the left mouse button while dragging the cursor around the image to draw freehand lines on the image.

**Note:** There is no undo action for drawing.

#### Inserting Text

To insert text onto a Redliner captured image, complete these steps:

1. Click the **Insert Text** button on the toolbar.
2. Place the mouse cursor over the transparent image window and single-click the left mouse button. The Insert Text dialog appears.
3. Select the desired Font, Style, and Size from the Text Properties section of the dialog.
4. Type the desired text into the Text to Insert field.
5. Press the **OK** button. The text appears at the location the cursor was at when the left mouse button was clicked to bring up the Insert Text dialog.

**Note:** There is no undo action for text insertion.

## Changing the Color of Lines or Text

To change the color of the text and/or lines to be added to an image, complete these steps:

1. Click the **Change Color** button on the toolbar. The Select Color dialog appears.
2. Select a color from the Swatches tab of the Select Color dialog.
3. Use the options on the HSB (Hue/Saturation/Brightness) and RGB (Red/Green/Blue) tabs of the Select Color dialog to adjust the selected color, if desired.
4. Click the **OK** button. The Select Color dialog closes, and the newly selected color appears in the right-most field of the status bar.
5. Click either the **Draw** button or **Insert Text** button to proceed to use the newly selected color on the image.

## Saving an Image

To save an image that you have captured in the Redliner window, complete these steps:

1. Select the **Save...** option from the File menu. The Save JPEG Image dialog appears.
2. Type the name you wish to give the image into the File name field.
3. Click the **Save Image** button on the dialog. The Save JPEG Image dialog closes and a JPEG file is saved with the name and location you specified in the Save JPEG Image dialog.

## Emailing an Image

You may email the current contents of the Redliner window to someone directly from Redliner. The image capture is automatically attached as a JPEG file to the email, and the Redliner Email dialog allows you to enter standard email information including recipient(s) (To:), carbon copy recipients (Cc:), and subject heading (Subject:) in the appropriate fields.

### Email Settings

Before you can send email from Redliner, you must first configure the email settings in the Redliner Preferences dialog. To configure the settings, complete these steps:

1. Select the **Email Settings...** option from the Action menu. The Redliner Preferences dialog appears.
2. Type your name into the **Display Name:** field. This is name that will appear as the sender's name in the email sent to the recipient.
3. Type your email address into the **Reply to Address:** field. This is the address that will appear as the sender's email address in the email sent to the recipient.
4. Change the name in the Attachment Name: field, if desired. This is the name that the image attachment will be given in the email sent to the recipient.
5. Type the name of your SMTP server into the **SMTP Server Name:** field. Your system administrator can provide you with this information.

**Note:** Redliner keeps a history of the email addresses that you have emailed images to. Press the **Clear** button beside the **Clear Address History** field to clear out this history.

6. Press the **OK** button on the Redliner Preferences dialog.

### Sending an Email

To email the image captured in the Redliner window, complete these steps:

1. Select the **Email...** option from the File menu. The Redliner Email dialog appears.

2. Type the email address(es) of the recipient(s) into the **To:** field.
3. Type the email address(es) of the carbon copy recipient(s) into the **Cc:** field, if any.
4. Type an email subject into the **Subject:** field.
5. Type any additional accompanying text for the email.
6. Press the **Send Mail** button to send the email.
7. If the email is successfully sent, a confirmation dialog appears.
8. If the email is not successfully sent, an error dialog appears.
9. Click the **OK** button on the Sending Email dialog. The Sending Email dialog closes.

## Printing an Image

To print the image captured in the Redliner window, complete these steps:

1. Select **Print...** from the File menu. The Print dialog appears.
2. Select the desired printer, page properties, print range, and copies in the Print dialog.
3. Press the **OK** button on the Print dialog. The Print dialog closes, and the output appears at your desired printer.



# Chapter 17

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## Configuration Assistant

Oracle Utilities Network Management System Configuration Assistant provides a graphical view of the Oracle Utilities Network Management System configuration options and allows the user to add, edit, and store configuration changes.

This chapter includes the following topics:

- **Getting Started with the Configuration Assistant**
- **Using Common Configuration Assistant Features**
- **Using the User Administration Tab**
- **Using the Event Management Rules Tab**
- **Using the Event Details Options Tab**
- **Using the Work Agenda Predefined Filters Tab**
- **Using the Default Restoration Times Tab**
- **Using the Customer Administration Tab**

### Getting Started with the Configuration Assistant

This section includes the following topics:

- **Accessing Configuration Assistant**
- **Logging In**
- **Using Common Configuration Assistant Features**

### Accessing Configuration Assistant

Configuration Assistant is accessed using a URL (web address) or as a local application, depending on your site's policy. Your system administrator determines the web address, if applicable. If accessing Configuration Assistant from a browser, complete these steps:

- Open your web browser by clicking the shortcut on the desktop, or from the Start menu.
- In the Address field of the browser, enter the URL for Configuration Assistant, then press Enter. Please wait while Configuration Assistant starts.
- If this is the first time running an Oracle Utilities Network Management System Windows-based product on your PC, you may be prompted to do a one-time download of a Java plugin. If so, select Yes/Accept/Agree on all subsequent dialogs until Configuration Assistant opens.

**Note:** You or your system administrator can add Configuration Assistant to your Start menu and/or create a shortcut icon on your desktop for quick access to Configuration Assistant. When you start up Configuration Assistant for the first time, it will (depending on installation method) ask if you want to install a shortcut in your Start menu and on your desktop.

## Logging In

The Login window is the first Configuration Assistant window you see. You must enter a valid user name and password, and then click the **Login** button. Once your user name and password are validated, the main Configuration Assistant window opens.

To log in to Configuration Assistant, complete these steps:

1. Depending on how your system was installed, either:
  - Click the **Configuration Assistant** icon found under the appropriate program group in your Windows Start Menu, or
  - Double click the **Configuration Assistant** icon on your desktop, or
  - Open a web browser and type the Configuration Assistant URL in the browser's Address field. The Configuration Assistant Login window displays.
2. Enter your User ID. This is the user name provided to you by the system administrator.
3. Enter your Password.
4. Click the **Validate** button. The bottom portion of the Configuration Assistant Login window sensitizes.
5. Select the appropriate User Type. This drop-down menu contains the list of user types within your authority.
6. Click the **Login** button. The appropriate Configuration Assistant window opens, based upon the User Type selected.



## Using Common Configuration Assistant Features

This section describes the common options available from the Configuration Assistant.

### Configuration Assistant Menus and Toolbar

This section describes the menu and toolbar options available with the Configuration Assistant.

#### File Menu.

Menu Option	Description	Toolbar Icon
<b>Export Configuration ...</b>	Generates SQL statements for the current state of the configuration associated with every tab on the application. Once generated, the SQL statements are displayed in a window with options to save or print the information.	
<b>Print Preview</b>	Opens the Print Preview dialog, which allows you to print out the User Administration tab, Event Management Rules tab, Event Details Options tab, and Work Agenda Predefined Filter tab information from the current Configuration Assistant window. See <b>Printing</b> on page 1-14 for details on using Print Preview.	

**Actions Menu**

Menu Option	Description
<b>Create Client Installer...</b>	Launches the client installer application. See the <i>Oracle Utilities Network Management System Installation Guide</i> for details on creating the installer and installing local copies of the Oracle Utilities Network Management System client applications.
	This menu item is not available on the Customer Administration tab, which has a unique <b>Actions</b> menu.

**Help Menu**

Menu Option	Description
<b>Configuration Assistant Help</b>	Opens the Configuration Assistant online help file.
<b>About Configuration Assistant</b>	Opens a dialog that displays information regarding what version of the application is presently running, as well as version and other information about the Oracle Utilities Network Management System Web Gateway that the application is using.

**Logout Menu**

The **Logout** menu includes the Logout User function. Once selected, the Configuration Assistant exits.

## Using the User Administration Tab

The Configuration Assistant User Administration tab allows an administrator to add and remove users, modify user types associated with users, and view user login activity. The User Administration tab contains the following panels:

- **Understanding the Current Users Panel**
- **Understanding the User Type Memberships Panel**
- **Understanding the User Log Panel**

From this tab, you can perform the following tasks:







- **Adding a User**
- **Editing a User**
- **Removing a User**
- **Saving an Exported User Configuration**
- **Changing User Type Memberships**
- **Reorder Current User Types**
- **Resetting a User Login**

## Understanding the Current Users Panel

The Current Users panel lists all of the users currently configured to use one or more modules of Oracle Utilities Network Management System, and allows you to add, edit and remove users.


Each time you select a row in the Current Users table, the User Type Memberships and User Log panels repopulate with information that pertains to the selected user.

The Current Users Panel displays the following fields and buttons:

- The **Username** column contains the Oracle Utilities Network Management System login name of the user.
- The **Full Name** column contains the full name of the user.
- The **Last Logon** column contains the date and time the user last logged on.
- The **Last Logoff** column contains the date and time the user was last logged off.
- The  **Add** button allows you to create a new user.
- The  **Remove** button allows you to remove an existing user.
- The  **Edit** button allows you to modify the Username and Full Name of the user.
- The  **Refresh** button refreshes the table with the current contents of the database.
- The  **Service Recache** button causes the Oracle Utilities Network Management System services to recache with the changes you've made in the Configuration Assistant window. If you do not do this, your changes will not be recognized until Oracle Utilities Network Management System services are restarted.
- The  **Export Configuration...** button generates SQL statements for the current state of the configuration associated with the User Administration tab. These SQL statements may then be saved to a file and/or printed.

### Adding a User

To add a new user to Oracle Utilities Network Management System, complete these steps:

1. Click  **Add** in the Current Users panel. The Add / Edit User Information dialog appears.
2. Enter a name into the **Username** field.
3. Enter a full name into the **Full Name** field.
4. Select a default zone from the **Default Zone Set** box.
5. Select an excluded zone from the **Excluded Zone Set** box.

**Note:** once you select a zone in either the Default Zone or the Excluded Zone, that zone will be removed as a choice from the other.


6. Select the user's account setting:
  - **Active User:** designates an active user account; required to login to NMS.
  - **Priority User:** used for callback processing, which sends priority customer callback notifications to users with the Priority User account setting selected.
  - **External User:** designates an external system user agent that connects to NMS via an interface, such as Web Callbacks or IVR.

#### **Note: Temporarily Inactivating a User**

When a user will be inactive for a period of time, you may wish to set their user status to inactive by deselecting the Active User option. This will keep them





from logging into the system, but allows for simple reinstatement when they become available.

7. Click  **Save**. The new user is added to the Current Users table.

**Note:** If the entered Username already exists, an error will appear and you will have to modify the username.

## Editing a User


To edit the name information for an Oracle Utilities Network Management System user, complete these steps:

1. Select the user you wish to edit in the Current Users table.
2. Click  **Edit**. The Add / Edit User Information dialog appears.
3. Modify any of the enabled fields, as desired.
4. Click  **Save**. The user information is updated in the Current Users table.

**Note:** If the modified Username already exists, an error will appear and you will have to modify the username.





## Removing a User

To remove a user from Oracle Utilities Network Management System, complete these steps:

1. Select the user you wish to remove in the Current Users table.
2. Click  **Remove**. A confirmation dialog appears.
3. Click **Yes** to remove the user or **No** to cancel the removal.

## Saving Exported User Configuration



To generate and save SQL statements for the current state of the configuration associated with the User Administration tab, complete the following steps:

1. Click  **Export Configuration...** beneath the Current Users table. A dialog appears indicating that the configuration is being generated.
2. Once the generation is finished, the Generated Configuration dialog appears.
  - To save the generated SQL statements to a file, click  **Save**. The Save Configuration File dialog appears. Type a name for the file into the File name field. The Save Configuration File dialog disappears.
  - To print the generated SQL statements, click  **Print**. The Print Preview dialog appears.
  - Click  **Cancel** to close the Generated Configuration dialog.

## Understanding the User Type Memberships Panel



The User Type Memberships Panel lists all of the products and user types a selected user is currently configured to access. You may add or remove access to products and user types for a selected user.

The User Type Membership Panel displays the following fields and buttons:

- The **Products** column lists the Oracle Utilities Network Management System product modules that a user may be configured to have login access to. When you select an item in the Product column, the Remaining User Types and Current User Types columns populate to show you which user types the selected user currently does and does not have access to for the selected product.
- The **Remaining User Types** column lists the user types for the selected product that the selected user does not currently have access to.
- The **Current User Types** column lists the user types for the selected product that the selected user does currently have access to.
- The  **Add Selected User Type(s)** button allows you to grant access to a selected user type from the Remaining User Types column to the selected user.
- The  **Remove Selected User Type(s)** button allows you to remove access to a selected user type from the Current User Types column from the selected user.

### Changing User Type Memberships





To modify the user type memberships for a user, complete the following steps:

1. Select the user whose memberships you wish to modify in the Current Users table. The User Type Memberships table populates with the current user type information for the selected user.
2. Select the desired product from the Products column. The Remaining User Types and Current User Types columns populate with the current user type information for that product for the selected user.
3. Select the user type(s) from the Remaining User Types column that you'd like to add to the user for the selected product.
4. Click  **Add Selected User Type(s)**. The selected user type(s) now appear in the Current User Types column.
5. Select the user type(s) from the Current User Types column that you'd like to remove the user from for the selected product.
6. Click  **Remove Selected User Type(s)**. The selected user type(s) now appear in the Remaining User Types column.

### Reorder Current User Types

To change the order of the configured user types on the login window(s), complete the following steps:

1. Select the user whose memberships you wish to modify in the Current Users table. The User Type Memberships table populates with the current user type information for the selected user.
2. Select a user type in the Current User Types column that you wish to move in the list. The arrows to the right of the column are now sensitized.

3. Click the appropriate arrow to change the user type order:
  - Click  to move the selected user type up to the top of the list.
  - Click  to move the selected user type up one position in the list.
  - Click  to move the selected user type down one position in the list.
  - Click  to move the selected user type down to the bottom of the list.

## Understanding the User Log Panel

The User Log panel displays the login history for the selected user. From this panel you may also fix log entries for a user that is unable to login because the system thinks the user is already logged in from elsewhere (*e.g.*, a system error of some sort prevented the database from being updated with the correct information).

The User Log panel displays the following fields and buttons:

- The **Host** column displays the name of the host machine that the user was logged in from.
- The **Display** column displays the name of the display machine that was being used.
- The **Product** column displays the name of the product the user was logged in to.
- The **User Type** column displays the name of the user type the user was logged in as.
- The **Login Date** displays the date and time of the user login.
- The **Login Status** displays the status of the user login (*e.g.*, SUCCESSFUL).
- The **Logout Date** displays the date and time of the user logout.
- The **Logout Status** displays the status of the user logout (*e.g.*, SUCCESSFUL).
- The **Reset Login** button allows you to force a logout entry into the database for a user that is still logged in per the User Log information. This is useful in cases where a user's client may have crashed for some reason and the user's loss of client isn't recorded in the database as a logout. The system also unsubscribes the user from any zones to which they were subscribed.

## Resetting a User Login

To reset a user login, complete the following steps:

1. Select the user whose login you wish to reset in the Current Users table. The User Log table populates with the login history for the selected user.
2. Select the row in the User Log table that pertains to the login you wish to reset (this must be a row where the Logout Date, Logout Status, and Logout Method columns are blank). The **Reset Login** button sensitizes.
3. Click the **Reset Login** button. The User Log table updates the selected row with the current date and time for the Logout Date, FORCED for the Logout Status, and SYSTEM for the Logout Method.

## Using the Event Management Rules Tab

The Event Management Rules tab allows an administrator to add, edit, remove, update, and activate Event Management Rules in the Oracle Utilities Network Management System. These rules govern the behavior and output of Oracle Utilities Network Management System Trouble Management in various situations, such as outage prediction, crew behavior, momentary outage processing, etc.

The Event Management Rules tabs contains three panels:

- **Rule Categories Panel**
- **Currently Configured Rules Panel**
- **Documentation Panel**

From this tab, you can perform the following tasks:

- **Selecting a Category to View**
- **Resizing the Rule Categories Panel**
- **Filtering the Currently Configured Rules Table**
- **Adding a Rule to the Configuration**
- **Removing a Rule from the Configuration**
- **Editing a Rule in the Configuration**
- **Saving Exported Configuration**

### Rule Categories Panel



The Rule Categories panel on the Event Management Rules tab lists all of the Event Management Rules available for configuration, organized by functional category.

The Rule Categories panel displays the following buttons:

- The **Expand All** button expands all of the rule category folders to display their contents.
- The **Collapse All** button collapses all of the rule category folders.

#### Selecting a Category to View

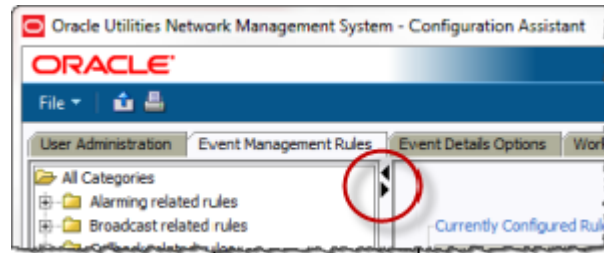
When you select a category folder from the Rule Categories panel, the folder expands to display the names of the Event Management Rules within that category. Some of the categories may also have sub-categories.

When an individual rule is displayed in the list, a symbol appears to the left of the rule. The  symbol indicates that the rule is already configured in at least one rule set. The  symbol indicates that the rule is not presently configured in any rule set.

When you select an individual rule (or certain categories) in the list, the Documentation panel on the Event Management Rules tab populates with documentation for the selected rule.

## Resizing the Rule Categories Panel

You can resize the Rule Categories panel by dragging the right side of the panel to the left or right. You can also quickly expand or collapse it by clicking the directional arrows next to the upper right corner of the rules categories panel.




## Currently Configured Rules Panel

The Currently Configured Rules panel on the **Using the Event Management Rules Tab** tab lists the SRS rules configured for Oracle Utilities Network Management System, and it allows you to add, edit, and remove rules.

The Currently Configured Rules panel displays the following fields and buttons:

- The **Set Name** column displays the Set Name that the rule is configured in.
- The **Incident Type** column displays the configured Incident Type value of the rule.
- The **Rule Name** column displays the rule name.
- The **Rule Value 1** column displays the configured Rule Value 1 value of the rule.
- The **Rule Value 2** column displays the configured Rule Value 2 value of the rule.
- The **NCG Class** column displays the configured ncg class value of the rule.
- The **NCG Index** column displays the configured ncg index value of the rule.
- The **Rule Value Integer 1** column displays the configured Rule Value Integer 1 value of the rule.
- The **Rule Value Integer 2** column displays the configured Rule Value Integer 2 value of the rule.
- The **Rule Value Integer 3** column displays the configured Rule Value Integer 3 value of the rule.
- The **Rule Value Integer 4** column displays the configured Rule Value Integer 4 value of the rule.
- The **Rule Value Integer 5** column displays the configured Rule Value Integer 5 value of the rule.
- The **+ Add** button allows you to add a rule to the configuration.
- The **✗ Remove** button allows you to remove a selected rule from the configuration.
- The **✎ Edit** button allows you to edit the selected rule in the configuration.
- The **🔄 Refresh** button refreshes the table with the current contents of the database.
- The **📄 Service Recache** button causes the Oracle Utilities Network Management System services to recache with the changes you've made in the Configuration Assistant window. If

you do not do this, your changes will not be recognized until Oracle Utilities Network Management System services are restarted.

- The  **Export Configuration...** button generates SQL statements for the current state of the configuration associated with the Event Management Rules tab. These SQL statements may then be saved to a file and/or printed.



## Filtering the Currently Configured Rules Table

To filter the Currently Configured Rules table based upon a selected column value, complete these steps:

1. Click the cell that contains the value you want to filter the Currently Configured Rules table by.
2. Position your cursor over the relevant cell value, then right-click. A pop-up menu with the option **Toggle Auto Filter** appears.
3. Click the **Toggle Auto Filter** option on the pop-up menu. The Currently Configured Rules table is now filtered by the selected column/cell value combination. The label above the table displays what filter is currently applied to the table.
4. To remove the filtering, right-click over any portion of any row in the Currently Configured Rules table. A pop-up menu with the option **Toggle Auto Filter** appears, and a check now appears next to the option.
5. Click the **Toggle Auto Filter** option on the pop-up menu. The Currently Configured Rules table now contains all of its rows once again, as the filtering has been removed.

## Adding a Rule to the Configuration


To add a rule to the configuration, complete these steps:

1. In the Currently Configured Rules pane, click  **Add**. The Event Management Rule Fields dialog appears. If you had first selected a row in the Currently Configured Rules table, the dialog will be initialized with the values from that row.
2. Select the name of the rule you wish to add from the Rule Name drop-down menu.
3. Select the name of the rule set you wish to add the rule to from the Ruleset drop-down menu.
4. Indicate whether or not you want the rule to be activated in the rule set by checking (or unchecking) the **Active** checkbox.
5. Enter the desired configuration values for the remainder of the fields.
6. Click  **Save** to save the newly added rule.
7. If the newly added rule already exists in the specified rule set, a confirmation dialog appears.
  - Clicking **Yes** overwrites the existing configuration of the rule with the new configuration that you specified. Clicking **No** will not add the new rule and preserve the existing one.

**Note:** This is the only validation currently performed when adding a rule. Please refer to the individual rule documentation for further information regarding what the valid values are for a particular rule.



## Removing a Rule from the Configuration

To remove a rule from the configuration, complete these steps:

1. Select the rule you wish to remove in the Currently Configured Rules table.
2. Click  **Remove**. A confirmation dialog appears.
3. Click **Yes** to remove the rule or **No** to cancel the removal.

## Editing a Rule in the Configuration





To edit a rule in the configuration, complete these steps:

1. Select the rule you wish to edit in the Currently Configured Rules table.
2. Click  **Edit**. The Event Management Rule Fields dialog appears.
3. Modify the rule fields as desired.
4. Click  **Save**. The rule information is updated in the Currently Configured Rules table.
  - If the rule was modified such that it has a name of a rule that already exists in another rule set, an error dialog appears.
  - Clicking **Yes** will overwrite the existing configuration of the rule with the new configuration that you specified. Clicking **No** will not add the new rule and will instead preserve the existing one.

**Note:** This is the only validation currently performed when editing a rule. Please refer to the individual rule documentation for further information regarding what the valid values are for a particular rule.

## Saving Exported Configuration

To generate and save SQL statements for the current state of the configuration associated with the Event Management Rules tab, complete the following steps:

1. Click the  **Export Configuration...** button beneath the Currently Configured Rules table. A dialog appears indicating that the configuration is being generated.
2. Once the generation is finished, the Generated Configuration dialog appears.
  - To save the generated SQL statements to a file, click  **Save**. The Save Configuration File dialog appears. Type a name for the file into the File name field. The Save Configuration File dialog disappears.
  - To print out the generated SQL statements, click  **Print**. The Print Preview dialog appears.
  - Click the  **Cancel** button to close the Generated Configuration dialog.

## Documentation Panel

When you select an individual rule (or certain categories) from the list in the Rule Categories panel of the **Using the Event Management Rules Tab**, the Documentation panel populates with documentation for the selected rule.

## Using the Event Details Options Tab

The Event Details Options tab allows an administrator to configure the contents of each of the option menus that reside Event Details windows. (See **Event Details** on page 2-2 for more information.)

This tab contains one panel:

- **Event Details Options Panel**






Use this tab to perform the following tasks:

- **Adding an Option**
- **Removing an Option**
- **Editing an Option**
- **Saving Exported Event Details Configuration**
- **Reordering Options**

## Event Details Options Panel

The Event Details Options panel allows you to add, edit, remove, and reorder the contents of each of the option menus that reside on the Trouble Management and Web Trouble Event Details windows.



The Event Details Options panel displays the following fields and buttons:

- The **Event Type** allows you specify which event type configuration you want to modify the options of (e.g., Outage, Non Outage, Planned Event, Switching Event).
- The **Event Details Option Menus** selection menu contains a list of the option menus that exist for the selected Event Type.
- The **Options for Currently Selected Menu** table populates with the currently configured options for the selected option menu and event types.
- The  **Add** button allows you to add a new option to the selected option menu for the selected event type.
- The  **Remove** button allows you to remove the selected option.
- The  **Edit** button allows you to edit the selected option.
- The  **Refresh** button refreshes the table with the current contents of the database.
- The  **Export Configuration...** button generates SQL statements for the current state of the configuration associated with the Event Details Options tab. These SQL statements may then be saved to a file and/or printed.



## Adding an Option


To add a new option to an option menu, complete the following steps:

1. Select the Event Type whose option menu you wish to change.
2. Select the option menu you wish to change from the Event Details Option Menus drop-down list.
3. Click  **Add**. The Add/Edit Option dialog appears.
4. Enter the new option name in the **Option Name** field.
5. Click  **Save**. The Options for Currently Selected Menu table updates with the new option.

**Note:** If the option name already exists, an error will appear and you will have to modify the name.



## Removing an Option

To remove an option from an option menu, complete the following steps:

1. Display the Event Details Options tab on the Configuration Assistant window.
2. Select the Event Type whose option menu you wish to change.
3. Select the option menu you wish to change from the Event Details Option Menus drop-down list.
4. Select the option you wish to remove from the Options for Currently Selected Menu table.
5. Click the  **Remove** button. A confirmation dialog appears.
6. Click **Yes** to go ahead and remove the option. Click **No** to cancel the removal.

## Editing an Option





To edit an existing option, complete the following steps:

1. Display the Event Details Options tab on the Configuration Assistant window.
2. Select the Event Type whose option menu you wish to change.
3. Select the option menu you wish to change from the Event Details Option Menus drop-down list.
4. Select the option you wish to edit from the Options for Currently Selected Menu table.
5. Click the  **Edit** button. The Add/Edit Option dialog appears.
6. Make the desired changes in the Option Name field.
7. Click  **Save** to save the new option. The Options for Currently Selected Menu table updates with the edited option.

**Note:** If you enter the name of an option that already exists, an error dialog appears.





## Saving Exported Event Details Configuration

To generate and save SQL statements for the current state of the configuration associated with the Event Details Options tab, complete the following steps:

1. Display the Event Details Options tab on the Configuration Assistant window.
2. Click the  **Export Configuration...** button beneath the Options for Currently Selected Menu table. A dialog appears indicating that the configuration is being generated.
3. Once the generation is finished, the Generated Configuration dialog appears.
  - To save the generated SQL statements to a file, click  **Save**. The Save Configuration File dialog appears. Type a name for the file into the File name field. The Save Configuration File dialog disappears.
  - To print out the generated SQL statements, click  **Print**. The Print Preview dialog appears.
  - Click the  **Cancel** button to close the Generated Configuration dialog.

## Reordering Options

To change the order of the options on an option menu, complete the following steps:




1. Select the Event Type whose option menu you wish to change.
2. Select the option menu you wish to change from the Event Details Option Menus drop-down list. The Options for Currently Selected Menu table populates with the options for the selected option menu and event type.
3. Select an option in the table that you wish to move in the list. The arrows to the right of the column are now sensitized.
4. Use the arrow buttons to rearrange options:
  - Click  to move the selected user type up to the top of the list.
  - Click  to move the selected user type up one position in the list.
  - Click  to move the selected user type down one position in the list.
  - Click  to move the selected user type to the bottom of the list.



## Using the Work Agenda Predefined Filters Tab

The Work Agenda Predefined Filters tab on the Configuration Assistant window allows you to add, modify, and delete pre-defined filters for the Work Agenda. These pre-defined filters are used to remove (hide) specified rows from the Work Agenda list so that only the desired events are shown. Use this tab to perform the following tasks:

- **Adding a Filter**
- **Editing a Filter**
- **Deleting a Filter**



The Work Agenda Predefined Filters tab displays the following fields and buttons:

- The **Current Filter** drop-down displays the name of the currently displayed filter and allows you to select an existing predefined filter.
- The **Filter Option Table** contains the following columns:
  - The **Column Name** column displays all columns by which you can filter.
  - The **Filter Type** column displays the available filter types:
    - **Any** - No filter is applied. All values for this column are included. This is the default.
    - **Match** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field matches the value specified in the Value field.
    - **Like** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field includes the value specified in the Value field.
    - **Not Like** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field does not include the value specified in the Value field.
    - **Multi-Match** - When this filter type is selected, the Work Agenda will include only items where the value of column specified in the Column Name field matches any of the values specified in the Value field.
    - **Not** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field does not match the value specified in the Value field.
    - **Multi-not** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field does not match any of the values specified in the Value field.
    - **>** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field is greater than the value specified in the Value field.
    - **<** - When this filter type is selected, the Work Agenda will include only items where the value of the column specified in the Column Name field is less than the value specified in the Value field.
- The **Value** column allows you to enter the filter value.
- The  **Add** button allows you to add a new filter.
- The  **Save** button allows you to save a new filter or edit an existing filter.
- The  **Remove** button allows you to remove the selected filter.

- The  **Refresh** button refreshes the table with the current contents of the database.
- The  **Export Configuration...** button generates SQL statements for the current state of the configuration associated with the Work Agenda Predefined Filter tab. These SQL statements may then be saved to a file and/or printed.

## Adding a Filter


To add a new filter, follow these steps:

1. Click  **Add** on the Work Agenda Predefined Filters tab. The Add Filter Name dialog is displayed.
2. Enter a meaningful name for the filter and click **OK**. The new filter name is displayed in the Current Filter box. The Filter Options table displays a list of columns by which you can filter the Work Agenda. By default, the Filter Type for all columns is Any, indicating that no filter is currently applied.
3. To apply a filter to a particular column, select the desired Filter Type (described in the previous section) and enter the filter Value. For example, to filter the Work Agenda by restore date, locate the Restore Date column, then select '>' from the Filter Type drop-down, and enter a date in the Value column. The filter will display only events with a Restore Date greater than the date you entered.
4. Repeat step 3 for each column you want to filter by.
5. Click  **Save** to save the new filter criteria.

**Note:** To make the new filter criteria available in the Work Agenda, the name of the new filter needs to be added to the OTHER\_FILTERS column in the DYNTABLE\_VIEWS table for the desired Work Agenda view.


## Editing a Filter

To edit an existing filter, follow these steps:

1. From the Current Filters combo box, select the filter you want to edit.
2. Modify the filter settings as needed. To remove a filter, select **Any** from the Filter Type drop-down for that column. To filter by a particular column, select the desired Filter Type and enter a filter Value.
3. Click  **Save**. The filter is updated and will be available from the Work Agenda.





## Deleting a Filter

To delete an existing filter, follow these steps:

1. From the Current Filters combo box, select the filter you want to delete.
2. Click  **Delete**. A confirmation dialog is displayed.
3. Click **OK** to confirm the deletion. The filter is deleted and will no longer be available from the Work Agenda.

## Saving an Exported User Configuration

To generate and save SQL statements for the current state of the configuration associated with the Work Agenda Predefine Filter tab, complete the following steps:

1. Click the  **Export Configuration...** button beneath the Current Filter table.
2. Once the generation is finished, the Generated Configuration dialog appears.
  - To save the generated SQL statements to a file, click  **Save**. The Save Configuration File dialog appears. Type a name for the file into the File name field. The Save Configuration File dialog disappears.
  - To print out the generated SQL statements, click  **Print**. The Print Preview dialog appears.
  - Click the  **Cancel** button to close the Generated Configuration dialog.

## Using the Default Restoration Times Tab

The Default Restoration Times tab on the Configuration Assistant window displays the current default restoration time configuration and allows you to modify the ERT values for each device class by control zone.

**Note:** To change the system-wide default restoration time, see **Setting the System-Wide Estimated Restoration Time** on page 2-23.






## Device/Zone Default Restoration Times Pane

The Device//Zone Default Restoration Times pane provides a tabular view that provides the relationship between a control zone, a device, and the default restoration time that has been set for them.

### Columns

- The **Control Zone** column displays the control zone name.
- The **Device Class** column displays the device class name.
- The **User** column lists the user who configured the default restoration time.
- The **Default Restoration Times (minutes)** column displays the number of minutes to be used for the default restoration time for this control zone-device class combination.

### Buttons

- The  **Add** button opens the Add Default Restoration Time dialog.
- The  **Remove** button marks the selected default restoration time for deletion.
- The  **Save** button saves any changes you have made.
- The  **Refresh** button refreshes the screen. If you have any unsaved changes, the system asks if you want to save them.
- The  **Export Configuration** button opens the Generated Configuration window, which displays the SQL statements used to generate the current configuration.

### Row Highlighting

The table uses row highlighting to indicate changes that have not been saved. Red indicates that the row is marked for removal, green indicates the row has been edited, and light blue indicates that the row has been added.

Stark				
Lake				
	Overhead Transformer	system	90	
	Disconnect Switch	system	130	
	Pad Mount Transformer	nms11	60	

### Adding a Device/Zone-Based Default Restoration Time

To add a default restoration time for a specific device class-control zone combination, follow these steps:

1. Click **+ Add**. The Add Default Restoration Time window appears.

Add Default Restoration Time

Control Zone

Device Class

Select

Restore Time (minutes)

60

OK

Cancel

2. Click the **Control Zone Selection** button (  ) to display a list of control zones.

Add Default Restoration Time

Control Zone

Device Class

Restore Time (minutes)

OK

Control Zone Selection

OPAL

FUZZY

Stark

Stark Transmission

Stark Streets

Lake

Lake Sub

Marlboro Sub

Canton

Alliance

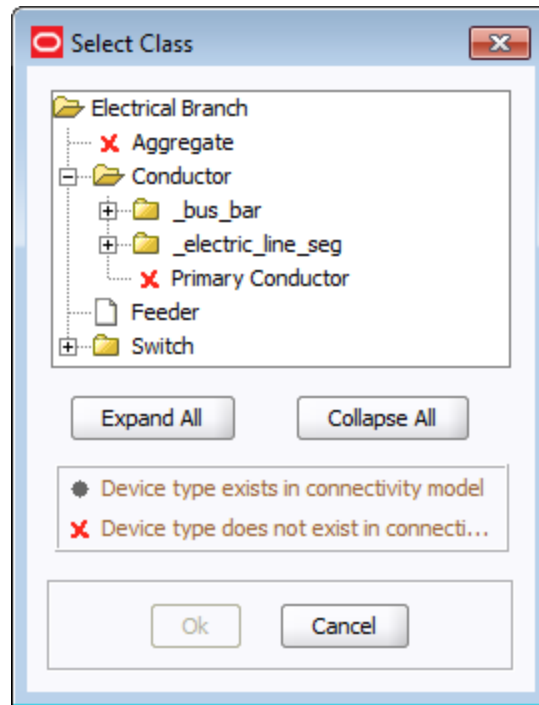
Massillon

(m)IEEE 123

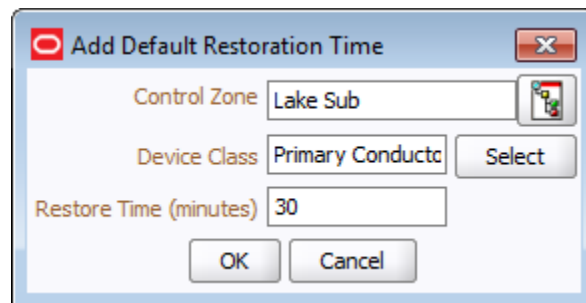
OK

Cancel

3. Select a Control Zone and click **OK**.
4. Click the **Select** button to display a list of device classes.



5. Select a device class and click **OK**.
6. Modify the Restore Time (minutes) field, as necessary.



7. Click **OK**. The Device//Zone Default Restoration Times pane refreshes with a new row, which is highlighted in light blue to show the addition.

	Pad Mount Transformer	nms11	60
--	-----------------------	-------	----

8. Click **Save** to commit the addition.


**Note:** if you decide against adding the new Default Restoration Time, click **Refresh**. The system will prompt you to save changes; click **No**.


## Modifying a Device/Zone-Based Default Restoration Time

To edit an existing default restoration time, do the following:

1. Double-click the Default Restoration Time cell to open it for editing.
2. Edit the value.
3. Click anywhere outside the cell to finish the edit. The row will be highlighted in green to indicate the pending change.


	Disconnect Switch	system	130
---	-------------------	--------	-----


4. Click  **Save** to commit the change.


**Note:** if you decide not to save changes, click  **Refresh**. The system will prompt you to save changes; click **No**.


## Deleting a Device/Zone-Based Default Restoration Time

To edit an existing default restoration time, do the following:

1. Select the row to be removed.
2. The  **Remove**. The row will be marked for removal pending saving changes. The row will be highlighted in red to indicate the pending change.





	Overhead Transformer	system	90
--	----------------------	--------	----

3. Click  **Save** to commit the change.

**Note:** if you decide against deleting the row, click  **Refresh**. The system will prompt you to save changes; click **No** to confirm the refresh.

## Saving an Exported Default Restoration Time Configuration

To generate and save SQL statements for the current state of the configuration associated with the Default Restoration Times tab, complete the following steps:

1. Click the  **Export Configuration...** button beneath the Device/Zone Default Restoration Times table.
2. Once the generation is finished, the Generated Configuration dialog appears.
  - To save the generated SQL statements to a file, click  **Save**. The Save Configuration File dialog appears. Type a name for the file into the File name field. The Save Configuration File dialog disappears.
  - To print out the generated SQL statements, click  **Print**. The Print Preview dialog appears.
  - Click the  **Cancel** button to close the Generated Configuration dialog.






## Using the Customer Administration Tab

The Customer Administration tab allows you to define a weighted priority for a customer. The weighted priority may be used for sorting events in the Work Agenda or viewed in the Trouble Info Customers view.

### Menus and Toolbar

When the Customer Administration tab is active, the Configuration Assistant's Actions menu and toolbar change to provide functions for Customer Administration. The Options menu provides search methods.

#### Actions Menu

Menu Option	Description	Icon
<b>Customer Search</b>	Initiates a search when criteria has been added to the Searchable Information table in the Customer Weighted Priority Editor pane.	
<b>Save</b>	Saves information entered in the Customer Weighted Priority Editor.	
<b>Reset to default</b>	Used to reset a Customer weighted priority to the default value.	--
<b>Clear Form</b>	Clears all data from the Customer Weighted Priority Editor pane.	

#### Options Menu

Menu Option	Description
<b>Set Wild Card Searching</b> <ul style="list-style-type: none"> <li>Before</li> <li>After</li> <li>Both</li> </ul>	Options for setting a wild card searches: Before, After, or Both. Note that you do not have to add a wild card character ( <i>e.g.</i> , *).  <b>Example:</b> using the "After" wild card search. <b>Name:</b> <i>Mary S</i> returns: <ul style="list-style-type: none"> <li>Mary S Abbott</li> <li>...</li> <li>Mary Szbrinski</li> </ul>

Menu Option	Description
Use Sound Search	<p>Returns searches with “sounds like” matches.</p> <p><b>Example:</b> Use Sound Search  <b>Name:</b> <i>Fredric</i>  returns:  <ul style="list-style-type: none"> <li>• Fredric</li> <li>• Fredrick</li> <li>• Frederick</li> <li>• Fred</li> <li>• Freda</li> </ul> </p>
Use Exact Match Search	Returns only exact matches.
Set Max Searching Results	<p>Opens the Set Maximum Searching Result dialog where you can set the limit for matches to return.</p> <p>The system will display a message when a search returns over 200 results, which is the maximum allowed by default.</p>

## Using the Customer Administration Weighted Priority Editor


The Customer Weighted Priority Editor is divided into two panes: **Searchable Information** and **Additional Customer Information**. As the name suggests, the **Searchable Information** pane is used to search for and load customer information. Once the customer is found and selected, the **Additional Customer Information** is populated with current information and the **New Weighted Priority** field becomes editable.

**Note:** the Configuration Assistant Customer Administration search functions are much like Web Call Entry’s search behavior.

### Searching for a Customer

To set a weighted priority for a customer, perform the following steps:


1. Set your search option; see **Options Menu** on page 17-27 for more information on search options.
2. Enter Search Criteria. You can search for a customer based on any of the fields in the Searchable Information pane:
  - Account Number
  - Telephone Number
  - Name
  - Address
  - City

3. Press Enter (or click the  search toolbar button).
  - If the search does not return a value, the system will return “*No customers matched your search criteria.*” Click **OK** to dismiss the message.
  - If the search returns more than 200 records (or your defined Max Searching Results value), the system will return the “Too Many Customers Found” message, which will remind you of the option to set a higher maximum searching results. Click **OK** to dismiss the message. The Customer Selection dialog opens listing the search results up to the maximum searching results value.
4. Select the customer to edit and click **OK**.

### Editing a Customer Weighted Priority

Once you have selected a customer from the search results, the customer account information is loaded into the Customer Weighted Priority Editor. The **New Weighted Priority** field, which is at the bottom of the Additional Customer Information pane, is the only editable field.


1. Enter an integer value in the **New Weighted Priority** field. Notice that the  Save button becomes enabled.

**Note:** If you decide against editing the selected customer, click  to reset the form.

2. Click .

### Resetting Weighted Priority

If you need to set a customer’s weighted priority back to its original value, perform the following steps:

1. Search for the customer to load their data into the Customer Weighted Priority Editor.
2. From the Actions menu, select **Reset to default**. The **New Weighted Priority** field will be populated with the customer's original weighted priority value.
3. Click .



# Appendix A









## Event Status and Event Type Codes










This appendix lists and describes coded information that appears in Oracle Utilities Network Management System screens, including:

















- **Event Status Codes**
- **Event Type Codes**








### Event Status Codes

Work Agenda displays the current status of each event listed. The event status is also displayed on the Call Information window. The following table provides the event status codes, their descriptions, and the associated icons used in the Work Agenda and associated tools.:

Status Code	Description	Icon
ASN	Crew is assigned to the event	
CMP	Event has been completed (job and event details are complete)	
CNL	Event has been cancelled by a user (using the Cancel Event button in the Work Agenda window)	
CRT	Acknowledged critical meet	--
ENR	Crew is en route to the event	
INC	Event has been completed, but information needs to be entered in the Event Details window	
MNP	Maintenance pending	
NEW	New unacknowledged event	--
NFY	Notify alarm	
ONS	Crew is onsite at the event	

Status Code	Description	Icon
RCVD	Order was received by mobile system and receipt was acknowledged by the MQ adapter.	
RED	New critical meet	--
RSCH	Rescheduled meet	--
RST	Event has been restored and a crew is still associated with the event	
SNT	Unassigned (acknowledged) event manually sent to the mobile system	
SUS	Crew has been re-dispatched to another event, but is still assigned to this one	
UAS	Unassigned (acknowledged) event	
VFY	A probable service outage is in this state if the system reports that the meter at the outage location has power. This state provides an indication for the operator to verify that the customer indeed is out of power.	--
C-CNL	Event has been cancelled by a “cancel call” trouble code, but a crew is still associated with the event. (You must then use the Cancel Event button to transition the event to CNL status.)	
F-ASN	Crew is assigned to the fault current event	--
F-CMP	Fault current event has been completed (job and event details are complete)	--
F-CNL	Fault current event has been cancelled	--
F-ENR	Crew is en route to the fault current event	--
F-NEW	New fault current event	--
F-ONS	Crew is onsite at the fault current event	--
F-UAS	Unassigned fault event.	--
M-CMP	Momentary event has been completed (job and event details are complete)	
M-INC	Momentary event has been restored, but information needs to be entered in the Event Details window	
M-NEW	New unacknowledged momentary event	--
M-RCVD	Momentary event was received by mobile system and receipt was acknowledged by the MQ adapter.	--
M-SNT	Unassigned (acknowledged) momentary event manually sent to the mobile system	

Status Code	Description	Icon
M-UAS	Unassigned (acknowledged) momentary event	
P-CMP	Planned event has been completed (job and event details are complete)	
P-INC	Planned job has been completed, but information needs to be entered in the Event Details window	
P-NEW	New unacknowledged planned event	--
P-RCVD	Planned event was received by mobile system and receipt was acknowledged by the MQ adapter.	--
P-SNT	Unassigned (acknowledged) planned event manually sent to the mobile system	
P-UAS	Unassigned (acknowledged) planned event	
S-ASN	Crew is assigned to the SCADA event	
S-CMP	SCADA event has been completed (job and event details are complete)	
S-ENR	Crew is en route to the SCADA event	
S-INC	SCADA event has been completed, but information needs to be entered in the Event Details window	
S-MNP	Maintenance pending (SCADA event)	
S-NEW	New unacknowledged SCADA event	--
S-ONS	Crew is onsite at the SCADA event	
S-RCVD	SCADA event was received by mobile system and receipt was acknowledged by the MQ adapter.	--
S-RST	SCADA event has been restored and a crew is still associated with the event	
S-SNT	Unassigned (acknowledged) SCADA event manually sent to the mobile system	
S-SUS	Crew has been re-dispatched to another event, but is still assigned to this SCADA event	
S-UAS	Unassigned (acknowledged) SCADA event	
W-ASN	Crew is assigned to the switching job	

Status Code	Description	Icon
W-CMP	Switching job has been completed (the corresponding switching plan has been completed)	
W-CNL	Switching job has been cancelled (the corresponding switching plan has been rescheduled)	
W-ENR	Crew is en route to the switching job	
W-ONS	Crew is onsite at the switching job	
W-RCVD	Switching job was received by mobile system and receipt was acknowledged by the MQ adapter.	--
W-SNT	Unassigned (acknowledged) switching job manually sent to the mobile system	
W-SUS	Crew has been re-dispatched to another event, but is still assigned to this switching job	
W-UAS	Unassigned (acknowledged) switching job	

## Event Type Codes

Event Type codes are displayed on the Trouble Call Entry Lists. Below is a complete list of event type codes and their descriptions:

Event Type Code	Description
CSCO	confirmed secondary outage
CSVO	confirmed service outage
FUZZY	fuzzy event
NFY	notify alarm
NON	non-outage
PDO	probable device outage
PLAN	planned outage
PMO	probable momentary outage
PSO	probable service outage
RDO	real device outage
RMO	real momentary outage
MEET	meet
SWP	switching job



# Appendix B

## Color Coding

This appendix lists and describes color coding that appears in Oracle Utilities Network Management System screens, including:

- **Crew Status**
- **Conductor Symbolology**
- **Event Status**
- **FLISR Status**
- **Callback Status**
- **Feeder/Device Condition Names and Colors**

**Note:** All color coding is configurable and your site may use different colors than those shown in this appendix.

### Crew Status

The table below describes the color coding used on the Crew Actions and Crew List windows to indicate crew status when cell coloring is enabled in the Web Workspace Preferences (see **Color Coding Options** on page 1-7). These colors are also used for AVL crew symbols in the Viewer.

Color	Crew Status
Green	En Route
Dark Green	Onsite
Yellow	Unavailable
Cyan	Assigned
Orange	Suspended
Brown	Crew has no control zone (i.e., the crew's assigned control zone has been removed from the control zone hierarchy).
White	Available

## Event Status

The table below identifies the color coding used on the Work Agenda list to indicate the event status when cell or row coloring is enabled in the Web Workspace (see **Color Coding Options** on page 1-7).

Row Color	Event Status
White text on dark red background	NEW
White text on light red background	M-NEW
White text on red-orange background	P-NEW
White text on red background	S-NEW
White text on bright red background	RED
Red text on white background	NFY
Black text on yellow background	SNT
	UAS
Black text on pale yellow background	M-SNT
	M-UAS
Black text on gold background	P-SNT
	P-UAS
	W-SNT
	W-UAS
Black text on dark gold background	S-SNT
	S-UAS
Black text on cyan background	ASN
	S-ASN
	W-ASN
Black text on green background	ENR
	S-ENR
	W-ENR
Black text on dark green background	ONS
	S-ONS
	W-ONS
White text on blue background	RST
	S-RST

Row Color	Event Status
Black text on gray background	CMP
	P-CMP
	W-CMP
	S-CMP
	M-CMP
Black text on orange background	SUS
	S-SUS
	W-SUS
White text on purple background	INC
White text on orchid background	P-INC
Black text on plum background	S-INC
White text on violet background	M-INC
Black text on white background	MNP
	S-MNP
Black text on light green background	C-CNL
White text on brown background	CNL
	S-CNL
	W-CNL

## FLISR Status

The Work Agenda is the starting point for viewing the status and results of the FLISR calculations. Each outage row is color-coded to represent the FLISR status of a job. The background color of the “Event #” field in the Work Agenda list indicates the FLISR status:

- **Yellow** - The job is currently being processed as a FLISR job and a solution is being searched for.
- **Green** - A FLISR solution has been found for the job.
- **Light Red** - A FLISR solution has been found but it overloads the restoring feeder – manual intervention will be required.
- **None** - No FLISR solution can be found for this job.

## Conductor Symbolology

In the Viewer, conductor symbology changes color and line style (*e.g.*, pattern, thickness) for different types of conductors and topology states. Conductor symbology is configurable. The following table shows the default color coding used for conductor symbology:

Line Style	Color	Description
Thin	Red	A Phase
Thin	Yellow	B Phase
Thin	Blue	C Phase
Dashed	Black and white	De-energization
Dashed	Black and gray	Partial energization
Thick	Light blue overlay	In Trace mode, indicates a conductor that is part of the path from a selected device
Thick	Dark pink	Grounded
Thick	Dark red	Different color codes for individual phases
Thick	Magenta overlay	Loop, bi-directional flow
Thick	Purple overlay	Parallel
Solid	Varies	Overhead line.
Dashed	Varies	Underground cable.

## Callback Status

The Callback Status field on the Perform Callbacks List Window and the Perform Next Callback window is color-coded to indicate whether a callback attempt has been made and the result of the last attempt. The following table shows the default color coding used for callback status:

Color	Description
<b>White</b>	<b>Not Called</b> - indicates you have not yet called the customer (default). The callback remains in the callbacks list.
<b>Blue</b>	<b>Restored</b> - indicates the customer confirmed their service was restored. The callback is considered complete and is removed from the callbacks list the next time it is brought up.
<b>Red</b>	<b>Not Restored</b> - indicates you called the customer, and the customer indicated that service was not restored. The callback is considered complete and is removed from the callbacks list the next time it is brought up. The call is re-introduced into the Oracle Utilities Network Management System for re-analysis and restoration and a new callback will be generated when that event is restored.

Color	Description
Green	Indicates one of the following: <b>No Answer</b> - indicates you attempted to reach the customer, but nobody answered the telephone. The callback remains in the callbacks list. <b>Busy</b> - indicates you attempted to reach the customer, but the line was busy. The callback remains in the callbacks list.
Brown	<b>Cancel</b> - cancels the callback. The callback is considered complete and is removed from the callbacks list the next time it is brought up.

## Feeder/Device Condition Names and Colors

The Feeder Load Summary and Feeder Load Management windows use color coding to indicate violations or warnings associated with feeders and devices. The following table lists the feeder/device condition number, name, and corresponding cell background and text coloring.

Condition Number	Condition Name	Condition Color
0.	Normal	Black text on Green background
1.	Backfeed Warning	Black text on Yellow background
2.	Not currently used.	
3.	Under Voltage Warning	Black text on Yellow background
4.	Over Voltage Warning	Black text on Yellow background
5.	Switch Overload Warning	Black text on Yellow background
6.	DistTrans Overload Warning	Black text on Yellow background
7.	Feeder Capacity Warning	Black text on Yellow background
8.	Conductor Overload Warning	Black text on Yellow background
9.	PowerTrans Overload Warning	Black text on Yellow background
10.	Not a valid violation type; used to distinguish between warnings and violations	
11.	Backfeed	Black text on Light Gray background
12.	Not currently used.	
13.	Under Voltage	Black text on Light Brown background
14.	Over Voltage	Black text on Gold background
15.	Switch Overload	Black text on Cyan background
16.	DistTrans Overload	Black text on Magenta background
17.	Feeder Capacity	Black text on Pink background
18.	Conductor Overload	White text on Orange background
19.	PowerTrans Overload	White text on Red background

Condition Number	Condition Name	Condition Color
20.	Model Error	Black text on Red background
21.	Non-converged	Black text on Red background
22.	SCADA Non-converged	Black text on Yellow background
23.	SCADA Suspect	Black text on Red background

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