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TOGA – TO Training Guide (View Only)

Specific Processes Training for Asset Management
Planning

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TOGA - Background

Introduction

This Guide is specifically orientated to the training needs and processes within Asset Management Field Staff and View only users, to enable them to continue to function using TOGA as opposed to TOPAM 2. It is therefore not an exhaustive guide on the functionality of TOGA but specific view only users. There are two key areas that this document explores from an AM perspective, the most likely used reports and Viewing Records, commissioning, planned pending and request outages.

Security and access and User Types

TOGA has a fairly complex security functions with the ability to create a roles from a pick list of options, ensuring users only see the data necessary for their role. This is particularly important as TOGA is externally accessible by TO's DNO's and Generators. TOGA also stores confidential information. Users are divided into five types:

- SO users who potentially can see all data
- TO users who see a smaller set of data
- Generator users – Company level who can see outages that affect all Power Stations that they own
- Generator users – Power Station level who can see outages that affect their Power Station.
- DNO User who see all outages that affect their DNO

The first two are know as internal users and the last three as external users.

TOGA production can be accessed by following the hyperlink: http://toga.ngc.co.uk/toga and logging in using your unique login ID and Password.

Reports

There are a number of reports available within TOGA the key one is the General Report.

General Report:

To access the General report from the Menu select: Topam Reports>Outage reports>General

The following screen is displayed:

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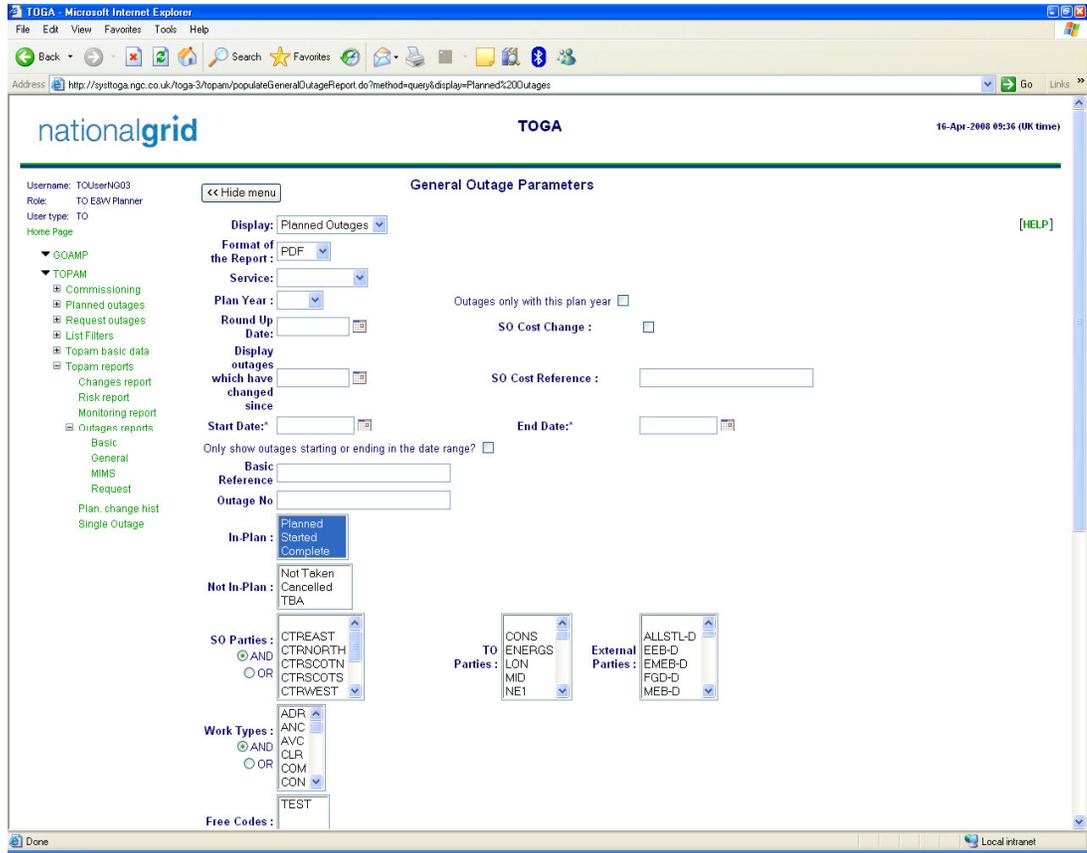
Things to Note:

All navigation is via the green links on the screen.
The Back button does not work consistently so I advise you don't use it.
There is always a help page link on top right hand corner of the page.

Selecting the information you would like returned:

The screen above shows some of the parameters that can be entered to create a search:

Field Description	Options	Comment
Display	Planned Outages Pending Outages Both	Displays only the outages that are in the plan, pending, or either pending or planned depending on the selection.
Format of Report	PDF HTML	Format of output, default PDF
Service	(Blank) In Service Out Of Service	If Left Blank will select in Service and Out of service bookings
Plan Year	Selection of available plan years	If a plan year is selected the Start and End date field will disappear, there is no need to select a plan year.
Outages only with this Plan Year Tick Box	Ticked	Returns outages only with this plan year
Round Up Date	Date	If a date in the past is entered the report will use the history record to display what the plan for the period looked like at the specified date.
SO Cost Change	Ticked	Searches for SO Cost Risk Changes

Display Outages which have changed since	Date	Report only displays outages that have changed since specified date.
SO Cost Reference	Reference No	Searches for outages that have Reference No
Start Date	Date	
End Date	Date	
Only Show Outages Starting or Ending in the Date Range	Ticked	If Ticked only shows outages starting or ending in period.
Basic Reference	Basic Data Code	Filters outages built on selected basic data
Outage No	Part Outage No	Returns data matching Part Outage No
In Plan	Planned Started Complete	All Options Automatically Selected
Not In Plan	Not Taken Cancelled TBA	Non planned statuses can be selected
SO Parties	List of SO Parties	
TO Parties	List of TO Parties	
External Parties	Lit of External Parties	
Work Type	List of Work Types (DCD Codes)	
Free Codes	List of Free Codes	
TO Significance	1 to 5	Priority of outage to TO 1 High 5 Low
Licensed Area	Default E/W	Not Selectable as TO User
Which Comments to Display	SO Comments TO Comments	Report contains selected comments
ERTS Between	xH and yH	Enter ERTS range
Outages Must Include all Substations	Tick Box	If Selected all Substations in list must be in outages returned
Group By Substation	Tick Box	If selected report groups outages by Substation
Substation	Either Substation or Group	Group is a predefined group of Substations.
Find and Add Buttons		Either Type 4 letter and Voltage code of substation and click add or use find commend and select substation and click add.
Only Type	Standard Comment TO Booking DNO	If selected report will only return outages of that type if none selected all outages are returned
Only Display	Fault Commissioning	Wil only diplay fault or commissioning bookings if selected otherwise it will return all outages.
SO Impact	A- MIS B- Connection C- Affects NGC D- Affects Operation E- No impact to SO	By default all these options are selected.
Display Summary Report	Tick Box	By Default ticks only displays high level information.
Actual Start/ End Dates instead of planned	Tick Box	If selected replaces planned information with Actual information when available.
PFW time only	Tick Box	Displays PFW Time only
Sort By outage No	Tick Box	If selected orders report by Outage NO

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Run Report		Executes report in new window.
Download Report		Executes report and returns Widow that can be saved as a text file.

This screen allows a User to generate a report listing planned or pending outages. In addition the user may enter a Round Up date (which uses the outage history to show the outages as at that point in time).

The report offers detailed and summary report formats: -

1 Paged Print option (which groups the outages by their starting week and displays the week number in the report heading)

2 The ability to group the data by substations

3 Download options for files of either planned or request outages listing outages that start, end or span the specific date.

4 The ability to look at outages that have changed since a user specified date and time.

Request Report:

To access the Request report from the Menu select: Topam Reports>Outage reports>Request

The following screen is displayed:
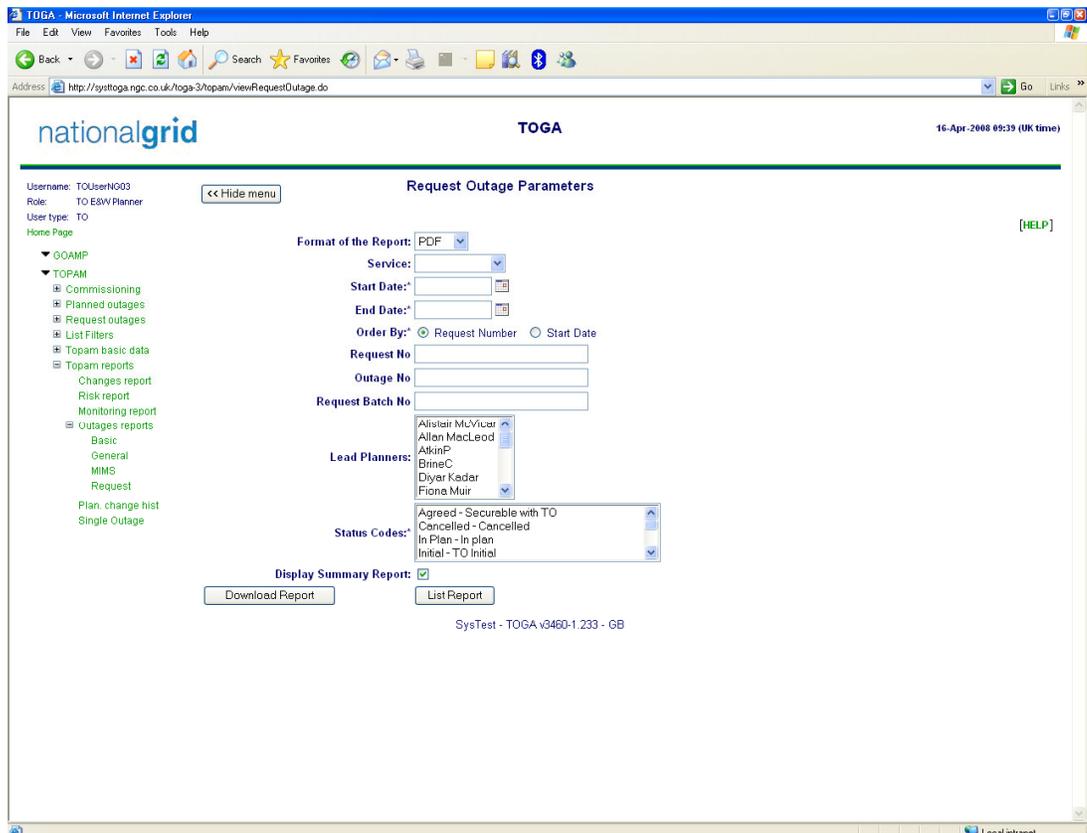
The screen above shows the parameters that can be entered to create a search:

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Field Description	Options	Comment
Format of Report	PDF HTMP	PDF is the default.
Service	(Blank) In Service Out Of Service	If Left Blank will select in Service and Out of service bookings
Start Date	dd/mm/yyyy	Mandatory
End Date	dd/mm/yyyy	Mandatory
Order By	Request No or Start Date	
Request No	Text	Enter part of the request No. Note case sensitive.
Outage No.	Text	Enter part of the outage No. Note case sensitive.
Request Batch No	Text	Enter part of the Batch No. if request added via a file upload. Note case sensitive.
Lead Planners	Select Name(s) from list	To select multiple names use Control Key and Mouse.
Status Code	Select one from list	Mandatory Field
Display Summary Report	Check Box	Checked by default if unchecked a full report is displayed with all the request information.

There are two execution options: List Report produces a screen display in a new window that can be viewed and printed.
Download Report: opens up an Excel Spread sheet, note the login screen reappears several times, just press cancel and it will eventually get the data in the spread sheet.

Reports Covered Later under Other Sections:
MIMS Download Report
Basic Data Report

Outages.

There are 3 generic types of outage within TOGA, Request Outages, Pending Outages and Planned outages. As an AM view only user you can review request outages, pending outages and planned outages. The diagram below shows in more detail the process around which TOGA was designed for standard transmission outages.

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Standard Transmission Outage Process

User : TO Planner	Transmission Outage System	User : GBSO Planner

Submit Request Outages

Request Outage awaiting SO review

Submit Request Outages

Rejected Request

Re-evaluate and amend Outage Request

Cancelled Request

Review Request Outage

Disagreed Request

Fasttrack Request into Plan

This section covers the Outage Requests process (Use Case 12)

This section covers the Outage Management process (Use Case 13)

Promote Request Outage to Pending

Accepted Request

Editable Pending Outage

Pass to GBSO for Approval

Pending Outage with GBSO

Review Pending Outage & add notes

Create planned outage from a basic or planned outage

Amend Outage and pass back to GBSO or delete

Rejected Pending Outage

Deleted

Planned Outage

Enter Actual Start Date

Started Outage

Enter Actual Finish Date

Completed Outage

Querying Requests.

To find requests you need to be able to query requests to do this select: Topam>Request outages>Query the following screen will be displayed:

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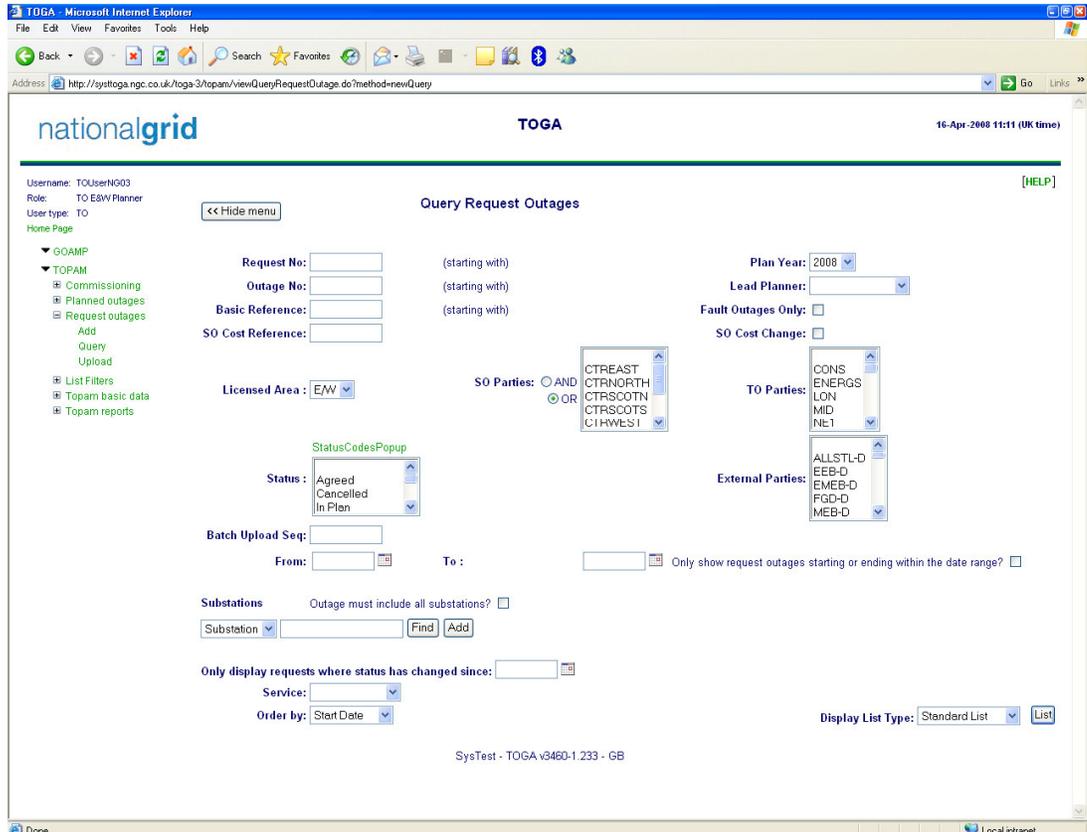
This is a screen that allows you to refine the query you wish to make the fields are as detailed below:

Field Description	Options	Comment
Request No.	All or part of request number	
Outage Number	All or part of Outage No	
Basic Reference	Basic data code	
Plan Year	Select from list	
Lead Planner	Select from List	
Fault Outage	Check	If Checked only returns fault outages
SO Cost Change	Check	Outage Changes due to SO Cost Change
Licensed Area	Defaults to your TO	
SO Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
TO Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
External Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
Status	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
Batch Up load Sequence	Enter upload No	
From	Dd/mm/yyyy	
To	Dd/mm/yyyy	
Only Show requests starting or ending within date range	Check Box	
Substations	Type in short code or	

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	use find and add to select substations	
Outage must include all substations	Check Box	
Only Display outages that have changed since	Dd/mm/yyyy	
Service	In Service Out of Service Blank	
Order By	Start Date Request No Outage No	
Display List Type	Standard List Updateable List	

This document will only look at the standard list, an updateable list is available which gives a fuller view but as you do not have update rights you cannot make changes, you wish to explore it further.

When a Query is run a screen similar to the one shown below is displayed:
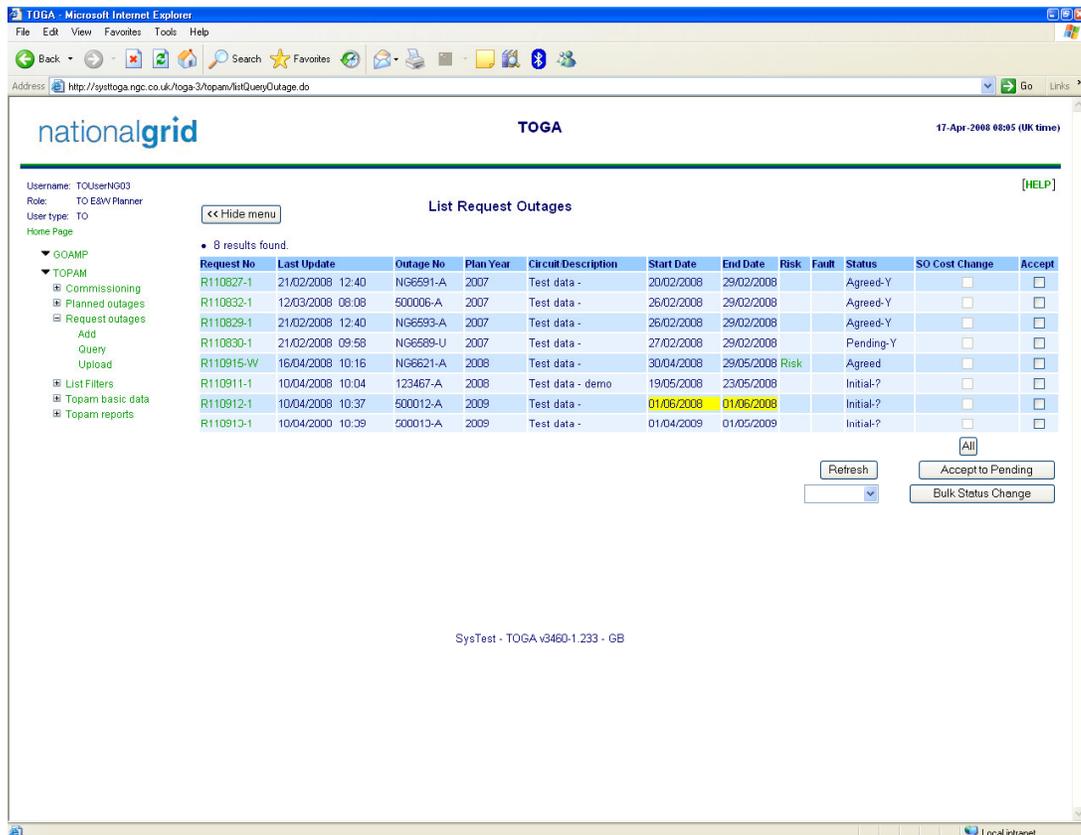
Note the Green hyperlinks to the records on the Request No on the Risk field and also on the fault field if it is a fault booking.

It is possible to look at each record individually it by clicking on the Green Request No.

To view one request booking click on the Green hyperlink and open the request record.

A screen similar to the one below will be displayed:
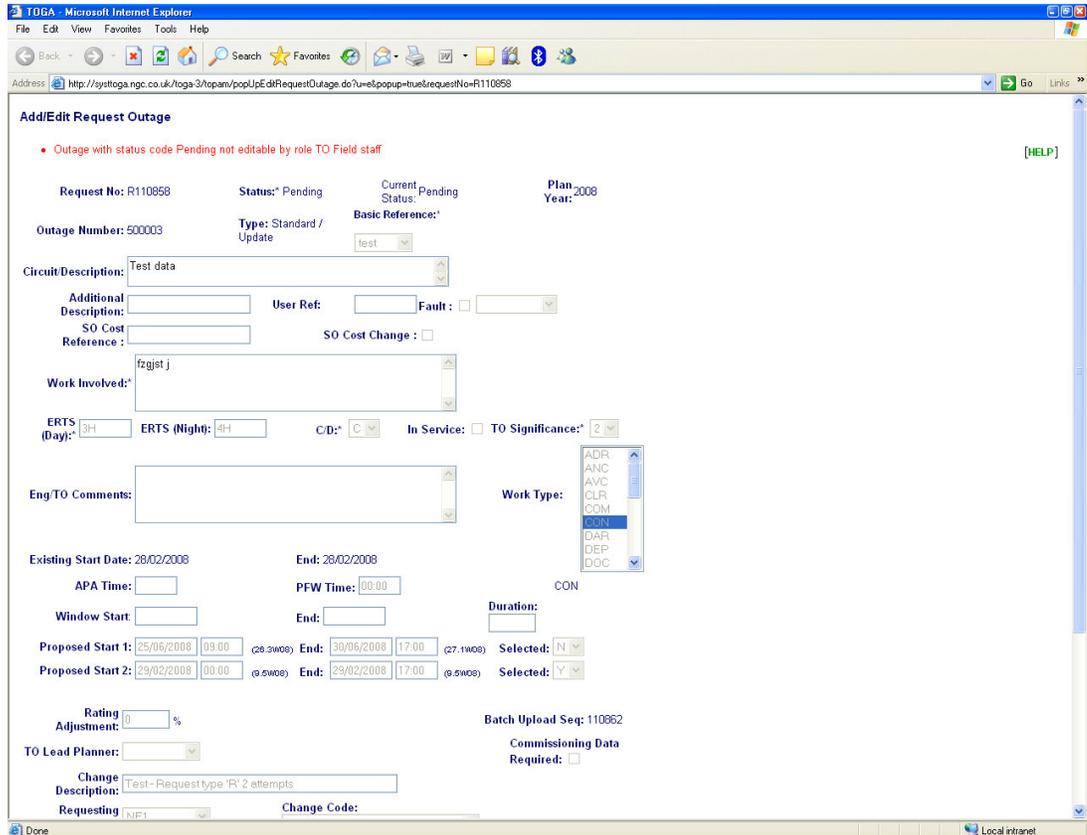
The fields that can be seen are described below:

Field Description	Options	Comment
Outage Number		
Status	Cancelled Initial Pending With SO	Initial the Status of all new requests unless changed by user. Cancelled Request no longer required Pending, moves the Request straight to Editable Pending, See Notes Below With SO promotes the reqest to the SO to look at.
Circuit Description	Free text field to enter the relevant information	Mandatory
Additional Description	Free Text	Added to Circuit description in most reports
User Reference	Free Text	Space to add personal / company reference
Fault Check Box	Ticked / Not Ticked	
Fault	Blank Trip Emergency	
SO Cost Reference	Free text for SO cost ref	
Work Involved	Free Text	Mandatory
ERTS (Day)	Emergency Return to Service (Day) format xM or xH or xD or xW or ONCOM	Mandatory Field in either Minutes, Hours, Days or Weeks or ONCOM
ERTS (Night)	As above	Mandatory Field if Continuous Booking
C/D	C D	Continuous Daily Booking select one. Mandatory

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In Service	Checked Un Checked	If Checked then the booking is an In Service Booking.
TO Significance	1 to 5	1 = must have 5= I need this some time
Eng/ TO Comment	Free Text	Text to write any comment relevant to outage.
Rating Adjustment	0-100 or Blank	Leave Blank
Work Type	Select DCD(s) code from list	Use Control key and mouse to select more than one
APA Time	hh:mm	Expected APA time if known
PFW Time	hh:mm	Expected PFW time if known
Window Start	dd/mm/yyyy	If window dates are proposed complete this field
Window End	dd/mm/yyyy	If window dates are proposed complete this field
Duration	xM xH xD xW	Any value with a letter suffix to identify units i.e. Minutes, Hours, Days, Weeks
Proposed Start 1 or 2	dd/mm/yyyy hh:mm	Start option with ISOS time
Proposed End 1 or 2	dd/mm/yyyy hh:mm	End Option with RTS time
Selected	? Y N	To promote a request to pending at least one option must be available and if there are two options one must be Yes.
TO Lead Planner	Will default your log in name but can be changed to other users	
Commissioning Data Required	Check Box	Used for Primary outages to indicate there is a commissioning involvement.
Change Description	Free text reason for change	Required if monitored change
Change Code	Predefined list of Change Codes	Required if monitored change
Requesting Party	Default to your TO Party	Can be changed to any TO Party
SO Comment	Free Text for SO to enter comments	Not available for use
Operational Remarks	Space for any operational type comments primarily for planned outages not TO bookings	
Winter ERTS Risk	Check if ERTS >18H For winter outages	Can be checked by TO or SO
Demand at Risk	Check if Demand at Risk	Can be checked by TO or SO
SO Impact	E	Not available to change.

As you do not have update rights you are unable to update any of these fields.

Links

When selecting the Links hyper link at the bottom of the record the following screen is displayed:
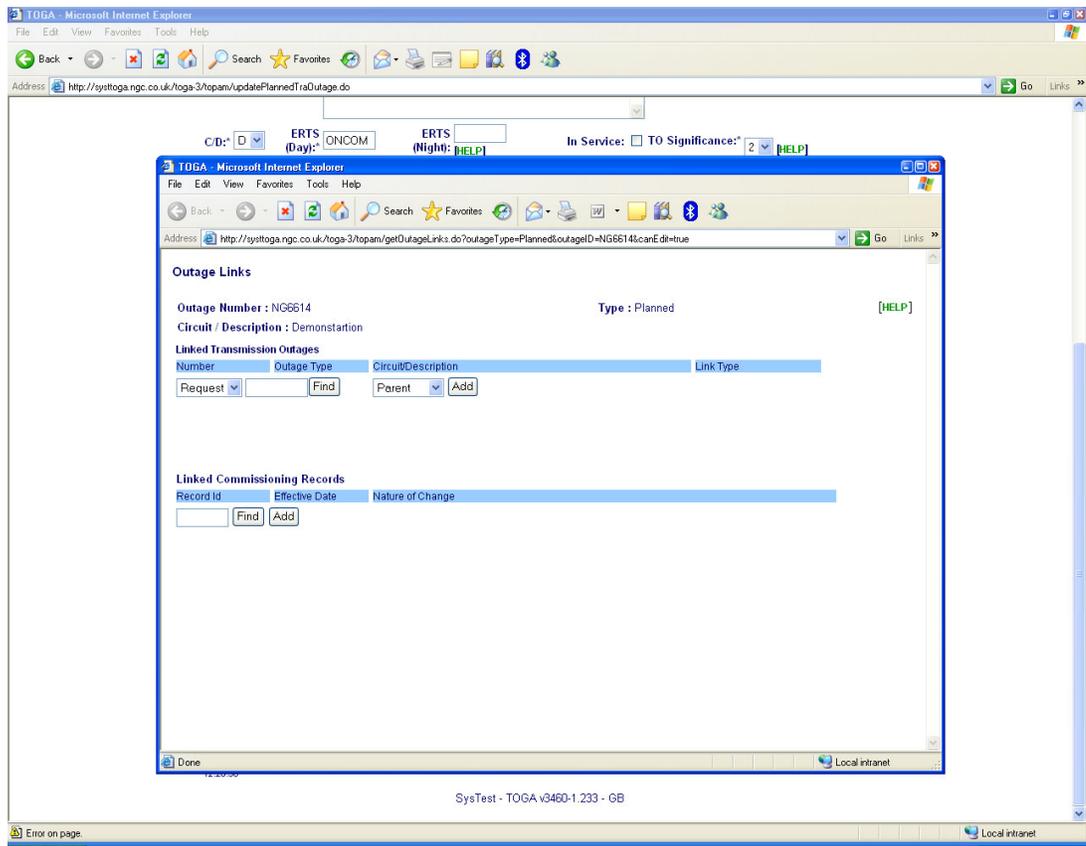
Links can be added to other outages and commissioning records, these can be viewed from this screen.
Once the Links have been viewed the window can be closed.

When selecting the Free Codes/Parties/Docs hyperlink the following window is displayed:

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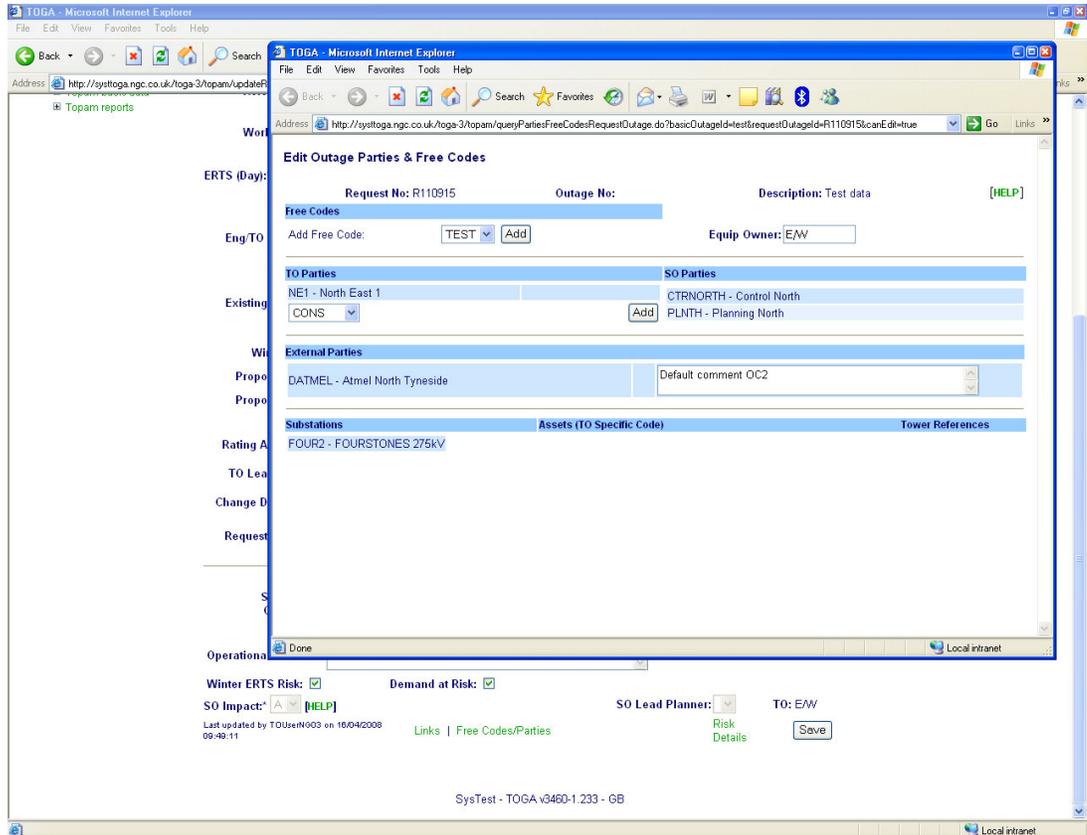
The parties associated with the BASIC data is populated here.

Query Planned Pending Outages.

To find requests you need to be able to query requests to do this select: Topam>Planned Outages>Query the following screen will be displayed:
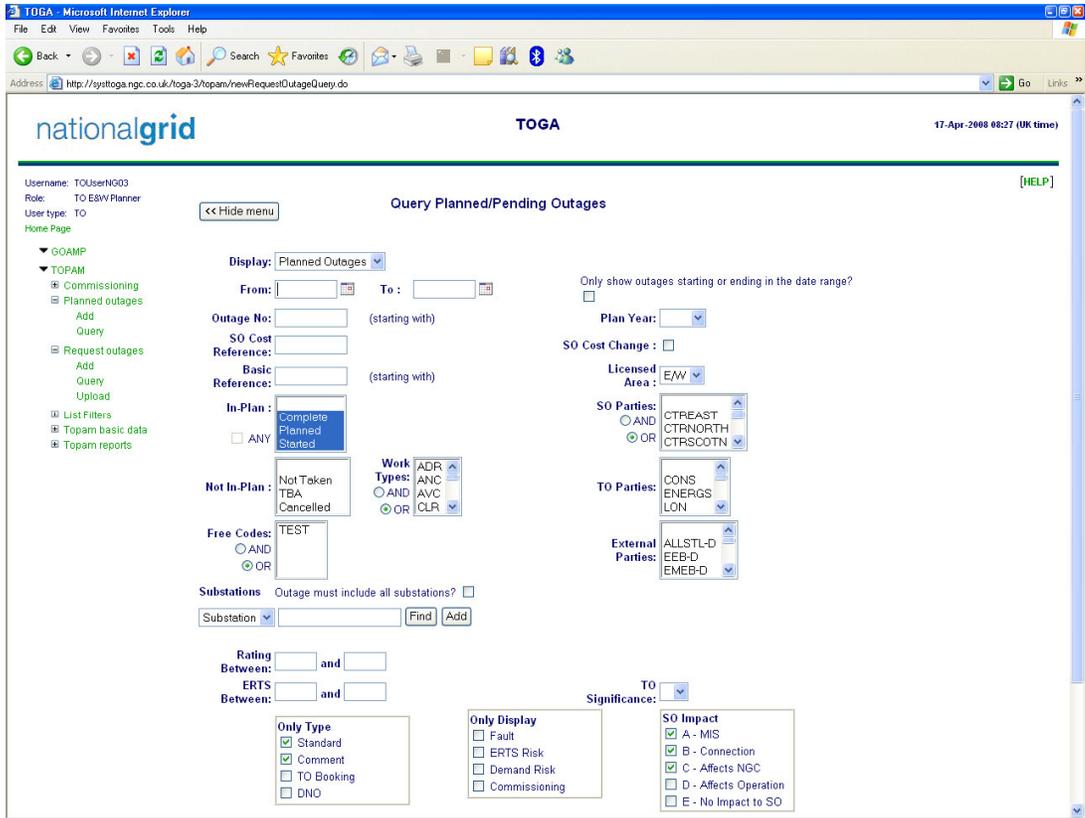
Note that it defaults to Displaying Planned outages in the Display drop down.

TO look for Pending Bookings select Pending Outages. To look for both Planned and Pending Bookings Select Both.
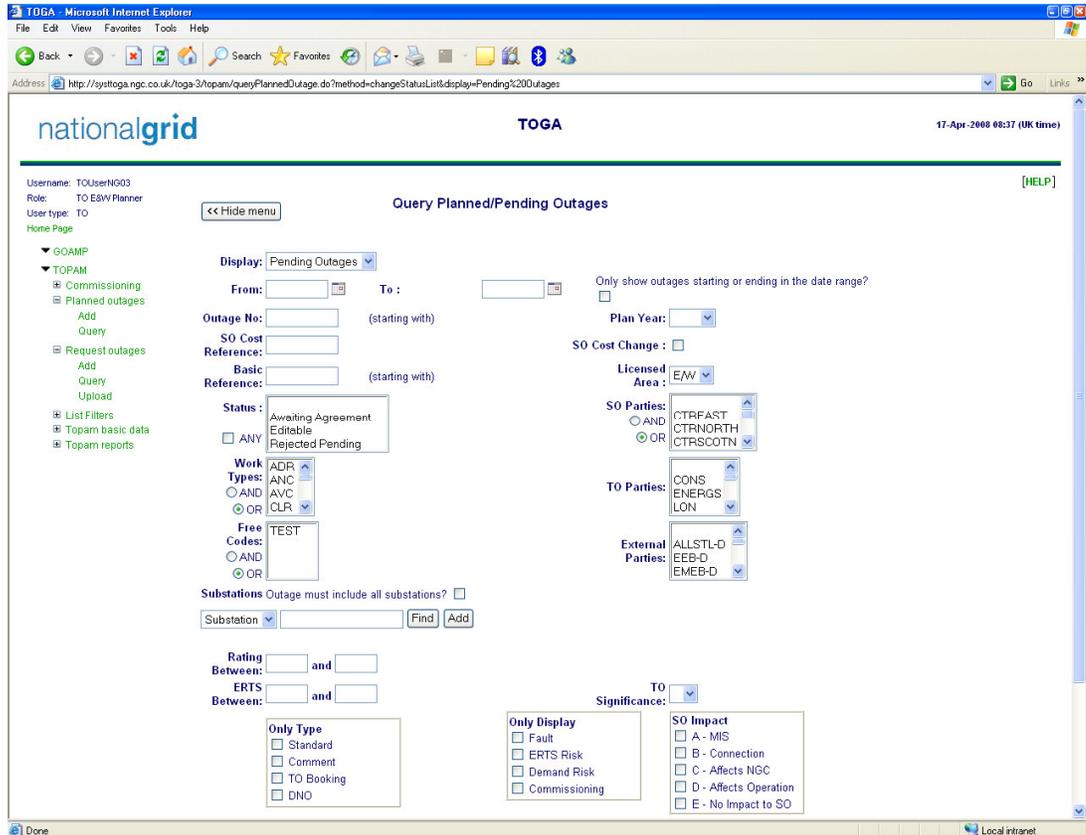
The field that can be searched on are as detailed below:

Field Description	Options	Comment
Display	Planned Pending Both	The widow changes slightly depending on which type of record is required.
From To	dd/mm/yyyy	
Only show outages Starting and Ending in the Date Range?	Check Box	If Checked only displays outages starting and ending in dare range.
Plan Year	Select from list	
Outage Number	All or part of Outage No	
SO Cost Reference	Text	All or part of Cost refernence
Basic Reference	Basic data code	
Licensed Area	Defaults to your Licensed Area	
Status	Select from List or Check any	To make multiple selections use Control Key and Mouse.
SO Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
TO Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
External Parties	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
Work Type	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
Free Code	Select from list or leave blank	Use Control Key and Mouse to make multiple selections.
Fault Outage	Check	If Checked only returns fault outages

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Substations	Type in short code or use find and add to select substations	
Rating between	Number 0- 100	Not proposed not be used initially.
ERTS Between	Number	Only searches for hours, this could be suspect. Suggest don't use.
TO Significance	Number 1 -5	
Only Type	Standard Comment TO Booking DNO	
Only Display	Fault ERTS Risk Demand Risk Commissioning	
SO Impact	A- MIS B- Connection C- Affects NGC D- Affect Operation E- No Impact on SO	
Include Commissioning Records	Check Box	Checked by default.
Only Display Outages which have changed Since	dd/mm/yyyy	
Service	Blank In Service Out Of Service	
Order By	Start Date Request No Outage No	
Display List Type	Standard List	Only option for TO

There are two options List or Bar Chart The bar chart displays outages in a graphical format but you are more likely to use the List option which returns a list of outages meeting the criteria.

When running a Query a screen similar to the one below is displayed depending on the search criteria used:
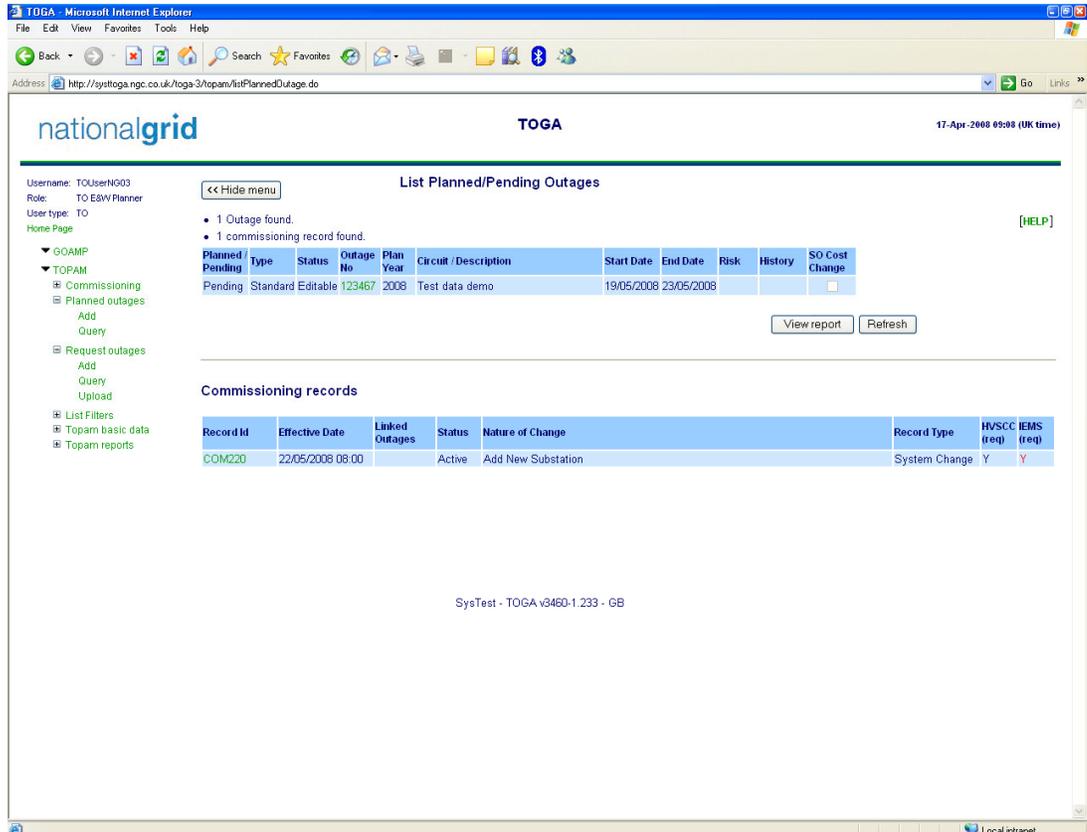
Again note the Green Hyperlink on the Outage No.

To open the outage record Click on the Hyperlink

List Filters

These are available but it is not envisaged that these will be used by view only users.

Commissioning Records

Commissioning records replace the information bookings placed within TOPAM 2 for HVSCC bookings and dates. Existing bookings have been carried forward as Outages within TOGA but new HVSCC's should be entered into a commissioning record. These commissioning records will be used to drive changes in the new study tool OLTA. This section looks at commissioning records and was written primarily for the NOC but is of interest if you need to veiw commissioning records.

Viewing Commissioning Records.

To View an existing commissioning record select Commissioning>View Comm, when this option is selected the following query screen is displayed.

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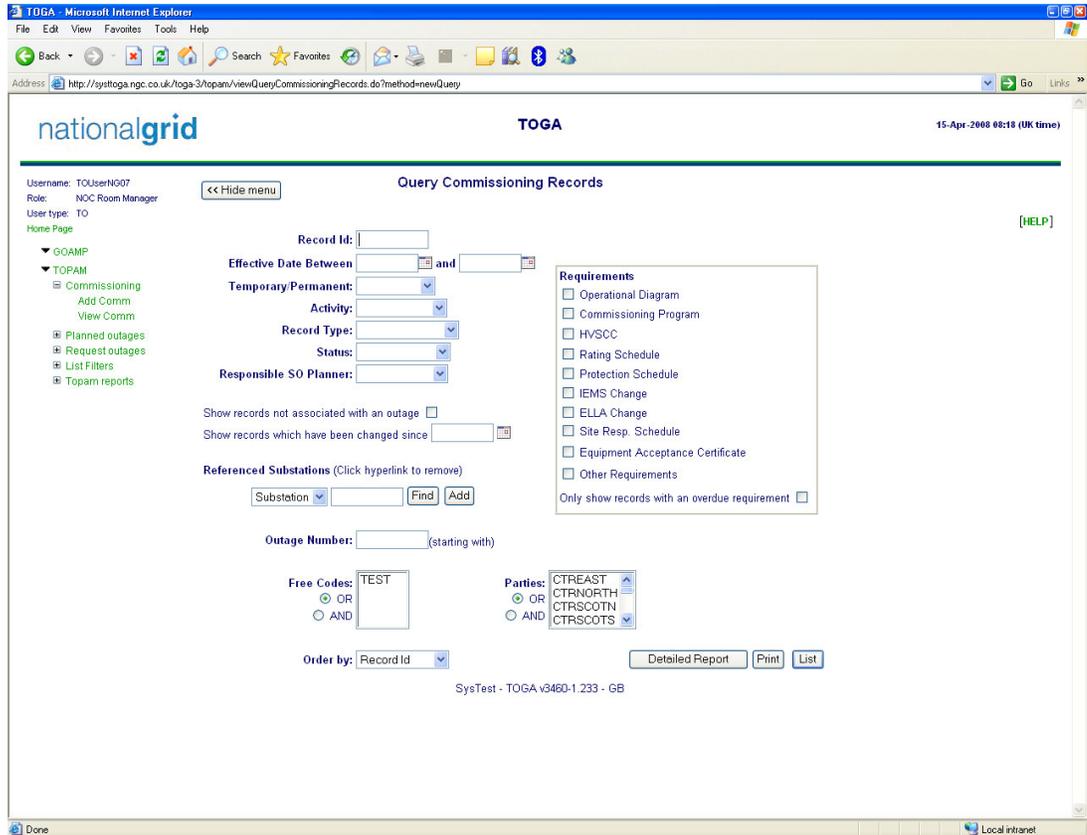
The query parameters that can be entered are detailed below:

Field Description	Options	Comment
Record Id	Any Part or all of a know commissioning record No	
Effective Date Between	Dd/mm/yyyy	Start of date range for search
and	Dd/mm/yyyy	End of date range for search
Temporary / Permanent	Blank Temporary Permanent	Note: Blank selects both Temporary and Permanent Changes
Activity	Blank New Replace Remove Update	Note: Blank selects all Activity types
Record Type	Blank System Change Commissioning	Record Type defines the type of commissioning Record: A System Change would be a change to the system i.e. requiring an HVSCC, commissioning would be a record that identifies the commissioning date and requirements
Status	Blank Active Part Complete Complete Cancelled	The status of the record show's where it is, this should be updated for System Change Records by the NOC Control Room to show that the System Change status once input by the NOC day staff.
Responsible SO planner	List of all SO planners	
Requirements	Series of Check Boxes	Operational Diagram

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		Commissioning Program HVSCC Rating Schedule Protection Schedule IEMS Change ELLA Change Site Responsibility Schedule Equipment Acceptance Certificate Other Requirements
Only Show Records with an overdue requirement	Check Box	If this check box is ticked it will only display records with Overdue dates as per TP106 time scales.
Referenced Substations	Any valid Substation short code	This can either be typed or the Find functionality can be used See below
Outage No	A part or all of a valid outage No	Commissioning Records can be associated with valid outage no's
Freecode	Any valid free code selected from list	Use Control key and mouse to select multiples
Parties	Both SO and TO parties are on this list	Use Control key and mouse to select multiples
AND / OR	Default OR Can Select AND	IF AND is Selected then when multiple selections are made the record must contain both.
Order By	Record Id Effective Date	

Once the required parameters for the Query have been entered 3 options exist to process the output:
1) Detailed Report (opens in a new window that can then be printed
2) Print (Summary Report opens in another window that can then be printed)
3) List (an on Screen view from which the record can be accessed and updated.)

The List Report is shown below:

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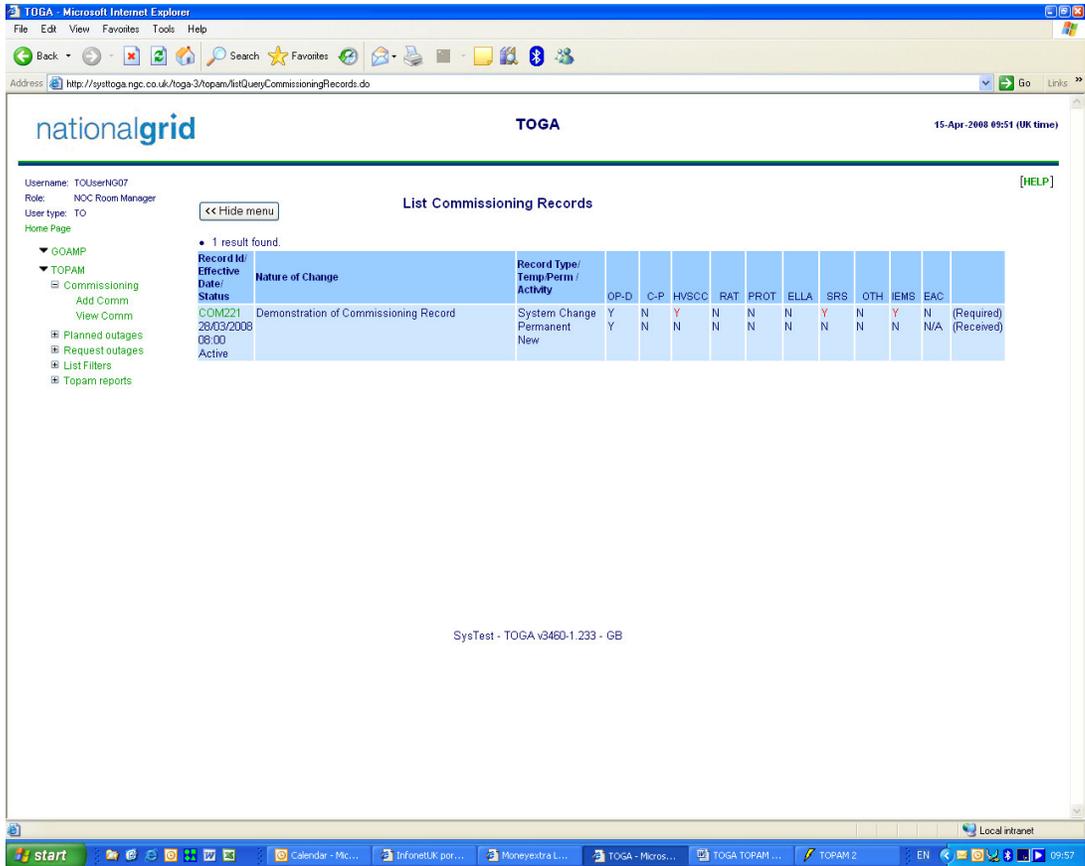
Note the Green link on the record which will take you to that record and allow you to update it if you have the correct permissions, also note the received note received flags in this view for the different required items and the highlighted items in Red that are required but overdue.

If the record is opened via Green link the following screen is displayed:

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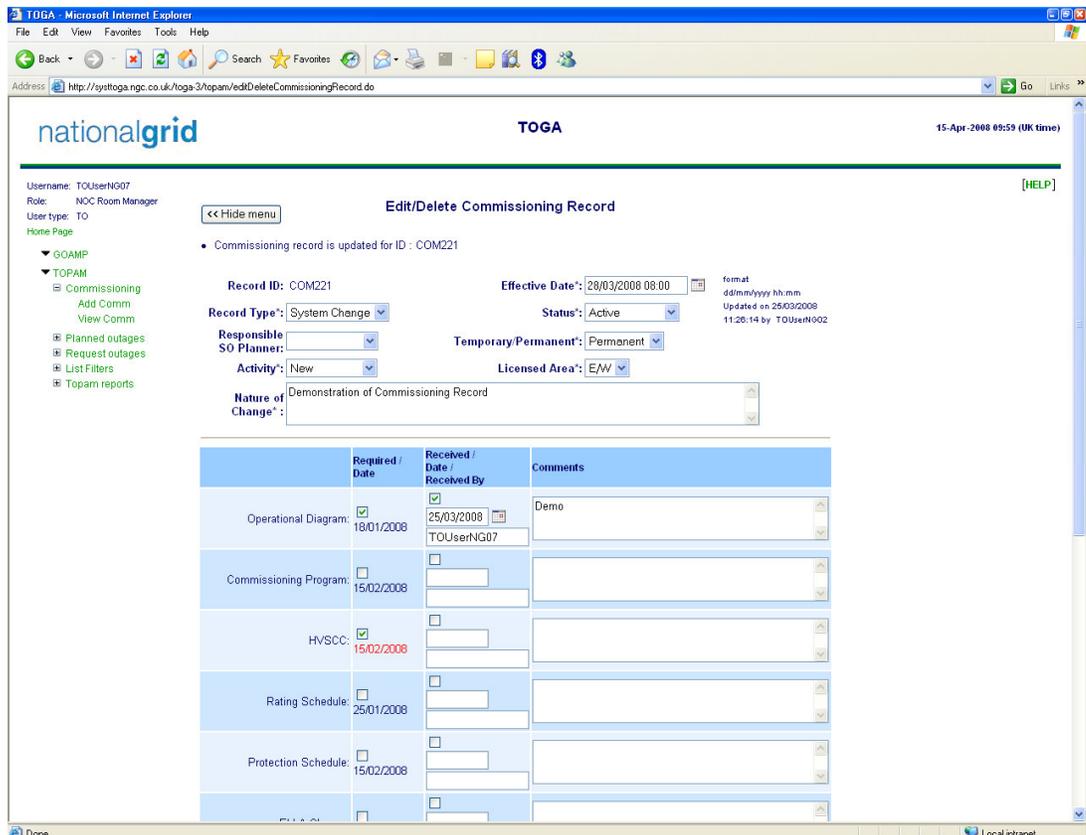
From this screen you can view and update the commissioning records if your role has sufficient permissions.

The fields in the record are:

Field Description	Options	Comment
Record Id	None	This number is auto generated by the system.
Effective Date	dd/mm/yyyy hh:mm	Effective date and time, the date can be selected form the calendar the time must be typed.
Record Type	System Change Commissioning	Record Type defines the type of commissioning Record: A System Change would be a change to the system i.e. requiring an HVSCC, commissioning would be a record that identifies the commissioning date and requirements
Status	Active Part Complete Complete Cancelled	The status of the record show's where it is, this should be updated for System Change Records by the NOC Control from Active to Part Complete or Complete
Responsible SO planner	List of all SO planners	If you know the SO scheme rep then select their name from the list
Temporary / Permanent	Temporary Permanent	Temporary or Permanent Change
Activity	New Replace Remove Update	What is the record for? A New asset, a Replacement asset, Removing an asset, Updating an existing asset.

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Licensed Area	Defaults to your Licensed Area	
Nature of Change	Free Text description of Change	
Requirements	Series of Check Boxes Operational Diagram Commissioning Program HVSCC Rating Schedule Protection Schedule IEMS Change ELLA Change Site Responsibility Schedule Equipment Acceptance Certificate Other Requirements	When the required check box is checked the required date is calculated when the Save button is used. Note the Received Check Box can also be Checked and today's date is entered as a default but this can be updated by the user. Comments against each requirement can be entered. When the record is saved the user entering the data's id is also stored.

At the end of the record there is the ability to link the record to a Substation, Asset or Outage.

For the Asset and Substation either type in their code or use the find functionality to find the data you require.

For the Outage it is necessary to know the outage no and type it in and press add.

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Appendix A Planned Outage Statuses

Status	Description
Planned - Planned	An outage that forms part of the plan. An outage will first get this status when it goes into the plan for the first time either from a Request Outage or from a Pending Add outage
Planned - Started	An outage that has started and actual start dates have been entered. Note it is only possible to update the end date at this status.
Planned - Complete	An outage that has been completed and actual start and end dates have been entered. Note it is NOTpossible to update any dates at this status.
Planned - TBA	After an outage has been placed in the plan the outage cannot be taken due to resources or system constraints / issues, although the work is still required.
Planned – Not Taken	An outage that has not been taken. Usually set to this status at short notice by the SO. If necessary the TO can then use a Request Outage to make suggestions for a new placement or make a new pending entry.
Planned – Cancelled	An outage that has been cancelled but a record that is retained for history. An outage is usually cancelled by the TO either by submitting a file a request to cancel an outage or by submitting via the screen a direct cancellation of a planned outage to be agreed by the SO

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Appendix B Work types

The following are the available work types. Several of these can be used when creating an outage.

Code	Description	Usual Status Main Circuit
AVC	SGT AVC out of service	In Service
CLR	Clearance outage	Out of service
COM	Commissioning work with SO	Out of service
CON	Construction work	Either
DAR	Dar outage	In Service
GEN	Generator outage	Out of service
INS	Insurance inspection	Out of service.
OFC	Over flying conductors	Out of service
OPS	Operational switching	Either
PRO	Protection outage	In Service
PTT	On load trip test	In Service
RAT	Rating restriction	In Service
ROM	Routine maintenance (equipment outage)	Out of service
ROT	Risk of trip	In Service
RSS	Requirement for safety switching	Out of service
SCO	System construction outage	Either
UCO	User construction outage	Either
UNC	Unclassified	Either
ADR	Ad hoc repairs/maintenance	Either
DEP	Protection Depletion	In service
ANC	Ancillary equipment on site, air systems etc	In Service
DOC	Comment entry for information only	In Service

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Appendix C Outage Number Prefixes

Company	Outage Number Prefix
Scottish Power	SP
Scottish Power's DNO	SD
Scottish & Southern	SH
Scottish & Southern (Scotland)DNO	HD
National Grid E/W TO	None
System generated by SO user or screen entry by TO if outages are normally transferred by file	NG