	CROP.50005 Capacity Analysis and Morning Report	
©2024	Approved By: Director, Operations	Effective Date: 10/04/2023
Rev #17	Procedure Owner: Manager, Control Room Operations	Valid Through: 10/04/2025

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References

1. CROP.24003 - Geo-Magnetic Disturbance

Procedure Background

The Morning Report is accessed from a short cut on the non-EMS desktop of the Operations Shift Supervisor and the Senior System Operator.

When the Senior System Operator publishes the Morning Report to the ISO-NE web site it is also transmitted to the LCCs. This report describes expected capacity conditions over the peak hour. The report updates and communicates key operating parameters that could affect system reliability.


The Senior System Operator populates certain data fields manually while other values in the report are calculated automatically within the program. Where applicable, the Senior System Operator should use the Capacity Analysis data provided by the Forecaster for verification.

QFS = Qualified Fast Start; it is a resource that is eligible to be a Fast Start.

This procedure is to define the process for developing the Morning Report, which is intended to provide the Local Control Centers (LCCs), Market Participants and others the best estimate of expected capacity available for peak-hour load and reserve requirements.

Explanation of the Morning Report Items:

- Capacity Supply Obligation (CSO) – The sum of all New England generators' Capacity Supply Obligations (CSOs). CSOs are requirements to provide capacity, acquired through a Forward Capacity Auction, a reconfiguration auction, or a bilateral contract
- Capacity Additions Eco Max bid > CSO – The sum of all generator MWs between CSO and Eco Max
- Generation Outages and Reductions – The sum of capability of all generation either scheduled Out of Service (OOS), forced OOS or reduced for the day, as known at the time of Morning Report development for the peak hour of the day.
- Uncommitted Available Generation (non Fast Start) – The sum of all generation that is available to come online but was **NOT** committed + MWs greater than Claim 30 for Fast Starts
- DRR Capacity – The Sum of the Max Reductions of all DRRs
- Uncommitted Available DRR - The sum of the Maximum Reductions of all non-Qualified Fast Start DRRs that are available to reduce load but not currently reducing
- Capacity Deliveries [Net Purchases are (-), Net Sales are (+)] – The total expected capacity transfers, by interface, at the time of the projected peak load.
- Total Available Capacity – Total available MW to meet the projected peak load demand.
- Forecasted Peak Load Hour and Peak Load – Identifies the expected peak hour and peak load forecast
- Total Operating Reserve Requirement – The sum of capability required covering required Ten Minute reserve % of first contingency loss within ten minutes and 50% of second contingency loss within 30 minutes.
- Capacity Required – Total to meet peak load plus operating reserve requirement
- Surplus/Deficiency – Capacity position projection at time of peak load.
- Replacement Reserve Requirement – In addition to the Operating Reserve Requirement, ISO will maintain a quantity of Replacement Reserves in the form of additional TMOR for the purpose of meeting the NPCC requirement to restore its Ten-minute reserve. The Reserve Replacement may be decreased to zero based upon ISO capability to restore Ten-

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minute Reserve within NPCC requirements.

- Excess Commitment – Capacity projected to be available at the peak hour above operating reserve and replacement reserve requirements.
- Peak Load Exposure – Peak load exposure used for the Annual Maintenance Schedule (AMS) development for the entire week (Saturday through Sunday). Updated every Saturday

Information about the application

In the Select Case display:


- Case ID: Each Morning Report data set is considered a "Case" as in other Market applications. However, Morning Report cases have only two possible states: Solved and Approved.
- Case ID is automatically generated when a case is created.
- Case Name Full Description: The case name is generated when the case is created. It is composed of words "Morning_Report05" for Preliminary study type, or "Morning_Report09" for Morning study type, concatenated with creation date in format "MM_DD_YYYY HH:MI:SS".
- Start Time: Market day in format "MM/DD/YYYY".
- End Time: End of the market day in format "MM/DD/YYYY 11:59 PM".
- Case State Description: Case state: Solved or Approved.
- Study Type: Study type: Preliminary, Morning, or Special.
- User Name: User's login name.
- Update Timestamp: Date of the last modification in format "MM_DD_YYYY HH:MI AM/PM".

The status line shows the following information:

- User Name
- User Role
- Environment (Integration, Production)
- Database name
- Server name for publication of the Internal Report (isowebint, isoweb)
- Server name for publication of the External Report (cmsi, cmsp)

Common Procedure Information

- A. Any ISO-NE qualified Control Room Operator has the authority to take actions required to comply with NERC Reliability Standards. A qualified ISO-NE Control Room Operator has met the following requirements:
 1. Have and maintain a NERC certification at the RC level (per R.1 of PER-003-2)
 2. Applicable Requirements of PER-005-2
 3. Approved to cover a Control Room Operator shift position by the Manager, Control Room Operations
 4. Is proficient at the current qualified level.
- B. Real time operation is defined as the current hour and the current hour plus one.
- C. Future hours are those beyond real time operation.
- D. All verbal communications with Local Control Centers (LCC), neighboring Reliability Coordinators/Balancing Authorities (RC/BA), Designated Entities (DE), Demand Designated Entities (DDE) and/or SCADA centers shall be made on recorded phone lines unless otherwise noted.
- E. Use the Basic Protocol for All Operational Communications as prescribed in M/LCC 13
 1. Use the Basic Protocol for All Operational Communications as prescribed in M/LCC 13
 2. Use 'ISO New England' or 'New England'. Refrain from using 'ISO'.
 3. Use Asset ID's when communicating with DE/DDEs.
 4. Use three-part communication in all situations where its use will enhance communications.
- F. Primary responsibilities are stated for each step within the procedure, but any ISO Control Room Operator qualified at that position or higher can perform the step. The Primary Responsibility may be delegated to an Operator in a lower qualified position, but the responsibility for its completion remains with the identified individual.
- G. The use of “ensure” within this document means that a verification has been performed and if the item is not correct, corrective actions will be performed.

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Procedure

Condition(s) to perform this section:

- Prior to preparing a Morning Report; Or
- To determine the effect of system condition changes on capacity.

Section 1: Perform a Capacity Analysis

Step 1.1 Primary Responsibility: Senior System Operator

Identify the applicable hour of the operating day to be evaluated.

Notes

The hour used can be:

- The peak hour;
- An hour that is identified as more limiting;
- A future hour of concern based on changing system condition

Step 1.2 Primary Responsibility: Senior System Operator

Access the ISO-NE Forecast Capacity Analysis software.

Step 1.2.1 Primary Responsibility: Senior System Operator

Select the applicable Study Case.

Notes

The Study case types are:

- Current Operating: Used when the Forecaster has **NOT** developed a new SCRA/RAA case.
- Market Case: Used when the Forecaster is developing or has developed an SCRA/RAA but it has **NOT** been published.

Step 1.2.2 Primary Responsibility: Senior System Operator

Enter the date and time for the case.

Instructions

- ☐ The date used is the date of the case.
- ☐ Use the identified hour ending for the case. Multiple hour endings can be entered and used to provide more information.

Notes

A future hour ending has to be entered.

Step 1.2.3 Primary Responsibility: Senior System Operator

Execute a case by clicking the "Load Market Data" button.

Step 1.2.4 Primary Responsibility: Senior System Operator


Load appropriate GRT data by clicking the "Load GRT Data" button and then selecting the GRT data for the date being studied.

Notes

This is done to ensure the capacity margin values align with what the SCRA indicates.

Step 1.3 Primary Responsibility: Senior System Operator

Access the Capacity Analysis (CAPSYS) in RTGEN.

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Step 1.4 Primary Responsibility: Senior System Operator

Determine the Generator Capacity Additions for the identified hour.

Instructions

- ☐ Click on “Capacity Additions” in the Forecast Capacity Analysis Software;
- ☐ Determine if any capacity addition values for Resources are not accurate for system conditions and correct if necessary.

Notes

Capacity additions are any Eco Max > CSO. As an example: Wind, Solar and Hydro auto-redeclaration processes will have an impact on these values.

Step 1.4.1 Primary Responsibility: Senior System Operator

Enter the determined Generator Capacity Additions value into the Capacity Analysis Future Hour column.

Step 1.5 Primary Responsibility: Senior System Operator

Determine the Generator Outages for the identified hour.

Instructions

- ☐ Click on “Outages” in the Forecast Capacity Analysis Software;
- ☐ Compare the RTGEN Generator outages in CAPSYS to the Forecast Capacity Analysis Software;
- ☐ Verify Resources listed are correct using CROW and any Resources that may have recently gone OOS unplanned that were expected to be available.

Notes

The expectation is to not perform a manual calculation of this value, it is merely a peer check of the data being used in the Forecast Capacity Analysis Software.

Step 1.5.1 Primary Responsibility: Senior System Operator

Enter the determined Generator Outages value into the Capacity Analysis Future Hour column.

Step 1.6 Primary Responsibility: Senior System Operator

Determine the Off-line Generator Reductions for the identified hour.

Instructions

- ☐ Click on “Offline Reductions” in the Forecast Capacity Analysis Software;
- ☐ Compare the RTGEN Offline Generator Reductions (Offline Available Reductions) in CAPSYS to the Forecast Capacity Analysis Software;
- ☐ Verify Resources listed are correct using CROW and any Resources that may have recently reported an unplanned reduction.

Notes

The expectation is to not perform a manual calculation of this value, it is merely a peer check of the data being used in the Forecast Capacity Analysis Software.

Step 1.6.1 Primary Responsibility: Senior System Operator

Enter the determined Off-line Generator Reduction value into the Capacity Analysis Future Hour column.

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Step 1.7 Primary Responsibility: Senior System Operator

Determine the On-line Generator Reductions for the identified hour.

Instructions

- ☐ Click on “Online Reductions” in the Forecast Capacity Analysis Software;
- ☐ Compare the RTGEN Online Generator Reductions (Online Reductions) in CAPSYS to the Forecast Capacity Analysis Software;
- ☐ Verify Resources listed are correct using CROW and any Resources that may have recently reported an unplanned reduction.

Notes

The expectation is to not perform a manual calculation of this value, it is merely a peer check of the data being used in the Forecast Capacity Analysis Software.

Step 1.7.1 Primary Responsibility: Senior System Operator

Enter the determined On-line Generator Reductions value into the Capacity Analysis Future Hour column.

Step 1.8 Primary Responsibility: Senior System Operator

Determine the Units in UCM2 and MW > 30 minutes numbers for the identified hour.

Step 1.8.1 Primary Responsibility: Senior System Operator

Determine the Generators in UCM2 total number.

Instructions

- ☐ Click on “Unavail Non-FS” in the Forecast Capacity Analysis Software;
- ☐ Compare the RTGEN Generators in UCM2 (Hot Start Unavailable Reductions) in CAPSYS to the Forecast Capacity Analysis Software;
- ☐ Verify Resources listed are correct using the CROW, the Current Operating Plan and any Resources that may have recently called in a request to come on-line for the operating day that were not part of the Current Operating Plan.

Notes

The expectation is to not perform a manual calculation of this value, it is merely a peer check of the data being used in the Forecast Capacity Analysis Software.

Step 1.8.2 Primary Responsibility: Senior System Operator

Determine the Fast Start units with MW being credited beyond 30 minutes (MW >30 number).

Instructions

Evaluate the 30 60 Report created by the Forecaster:

- ☐ Check the peak hour values being calculated from the 30 60 Summary tab;
- ☐ Check and modify as necessary the values calculated from the 30 60 Details tab.

Notes

- The 30 60 Report is generated from the SCRA ‘B’ & ‘07’ case and sent via email as an excel spreadsheet, however it can be generated and sent after any approved SCRA case.
- The 30 60 Report is calculated by evaluating all available qualified fast start units from on off-line state that are **NOT** Self-Scheduled.

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Step 1.8.3 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- If a >30 number that differs from the 30 60 report will be used.

Notify the Forecaster of the >30 number that will be used.

Step 1.8.4 Primary Responsibility: Senior System Operator

Determine the Generators in UCM2 MW value that will be used.

Step 1.8.5 Primary Responsibility: Senior System Operator

Enter the Generators in UCM2 MW value into the Capacity Analysis Future Hour column.

Step 1.9 Primary Responsibility: Senior System Operator

Determine the Total DRR Available MW and DRR >30 value for the identified hour.

Step 1.9.1 Primary Responsibility: Senior System Operator

Determine the DRRs with MW being credited beyond 30 minutes (DRR >30 number).

Instructions

Evaluate the 30 60 Report created by the Forecaster:

- ☐ Check the peak hour values being calculated from the 30 60 Summary tab;
- ☐ Check and modify as necessary the values calculated from the DRR 30 60 Details tab.

Notes

- The 30 60 Report is generated from the SCRA 'B' & '07' case and sent via email as an excel spreadsheet, however it can be generated and sent after any approved SCRA case.
- The 30 60 Report is calculated by evaluating all available qualified fast start units from on off-line state that are NOT Self-Scheduled.

Step 1.9.2 Primary Responsibility: Senior System Operator

Enter the determined Total DRR Available MW value into the Capacity Analysis Future Hour column.

Step 1.9.3 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- If a >30 number that differs from the 30 60 report will be used.

Notify the Forecaster of the DRR >30 number that will be used.

Step 1.10 Primary Responsibility: Senior System Operator

Determine the Total Non-QFS DRR value for the identified hour.

Step 1.10.1 Primary Responsibility: Senior System Operator

Enter the determined Total Non-QFS DRR value into the Capacity Analysis Future Hour column.

Step 1.11 Primary Responsibility: Senior System Operator

Determine the Interchange Schedules for the identified hour as shown in the SCRA.

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Step 1.11.1 Primary Responsibility: Senior System Operator

Identify dispatchable contracts for the identified hour.

Step 1.11.2 Primary Responsibility: Senior System Operator

Determine the Interchange Schedule for the identified hour.

Instructions

- ☐ Click on “Fixed Ext. Interchange” in the Forecast Capacity Analysis Software;
- ☐ Compare values with the TSO Day Before Checkout spreadsheet
- ☐ Discuss discrepancies with the Forecaster.

Step 1.11.3 Primary Responsibility: Senior System Operator

Enter the determined Interchange Schedules values into the Capacity Analysis Future Hour column, including dispatchable contracts as applicable.

Step 1.12 Primary Responsibility: Senior System Operator

Determine the load MW value for the identified hour.

Step 1.12.1 Primary Responsibility: Senior System Operator

Enter the determined load value into the Capacity Analysis Future Hour column.

Step 1.13 Primary Responsibility: Senior System Operator

Determine the first largest single source contingency for the identified hour.

Step 1.13.1 Primary Responsibility: Senior System Operator

Enter the determined hour's largest single source contingency and its value into the Capacity Analysis 1st Contingencies and MW wells.

Instructions

The largest single source contingency MW value entered is equal to (Ten Minute reserve %) * (first contingency loss value)

Step 1.14 Primary Responsibility: Senior System Operator

Determine the second largest single source contingency for the identified hour.

Step 1.14.1 Primary Responsibility: Senior System Operator

Enter the determined hour's 2nd largest single source contingency and its value into the Capacity Analysis 2nd Contingencies and MW wells.

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Step 1.15 Primary Responsibility: Senior System Operator

Verify the total Replacement Reserve Requirement value entered into the Capacity Analysis Future Hour column is correct.

Notes

The total Replacement Reserve Requirement is the combination of the Base Replacement Reserves and Additional Replacement Reserves.

- 160 MW is the base requirement used during daylight savings time (summer)
- 180 MW is the base requirement used during eastern standard time (winter)

Step 1.15.1 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- The current value entered for total Replacement Reserves in CAPSYS is incorrect.

Enter an updated total Replacement Reserve Requirement value.

Step 1.16 Primary Responsibility: Senior System Operator

Verify the values entered for expected OP-4 Actions are correct.

Instructions

Possible values associated with OP-4 Actions is:

- Emergency Capacity Deliveries

Step 1.16.1 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- Current value for Emergency Capacity Deliveries is NOT correct for the identified hour.

Enter an updated Emergency Capacity Deliveries value.

Step 1.17 Primary Responsibility: Senior System Operator

Press “Calculate” on the Capacity Analysis display to determine the Future Hour Capacity Margin value.

Step 1.18 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- Significant discrepancies are identified during the verification of the Forecast Capacity Analysis software.

Notify the Forecaster of any discrepancies identified.

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Condition(s) to perform this section:

- A Preliminary, Morning, or Special Report needs to be prepared for publishing.

Section 2: Develop the Morning Report

Notes

- A preliminary report is prepared and published prior to 0600 everyday.
- A morning report is prepared and published prior to 0900 everyday.
- A special report is prepared and published as determined by the Manager, Control Room Operations (or designee).

Step 2.1 Primary Responsibility: Senior System Operator

Create a new case.

Notes

When a new case is created the information from the last approved case will populate the display.

Step 2.2 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- If a special is being performed or the type is incorrect

Select the type of report being created.

Notes

- There are three types of reports, they are: Preliminary, Morning and Special.
- The report type automatically populates, so entering a type is only required if a special is being performed or the type is incorrect.

Step 2.3 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- Information is incorrect or missing.

Enter the previous day's peak load, hour ending (HE) and date.

Instructions

Request the previous day's adjusted peak load value and hour from the Forecaster.

Notes

The date automatically populates, so entering the date is only required when it is incorrect or missing.

Step 2.4 Primary Responsibility: Senior System Operator

Enter the Interchange Information for the ties.

Instructions

The following information is entered for all ties:

- ☐ Transfer Limit – The maximum transfer capability on the peak hour. Obtained from the Scheduling Parameters page in the Interchange Scheduling software, unless a more conservative limit is applied and documented in the Interchange Scheduling software
- ☐ Scheduled Contracts – The scheduled peak hour energy transfer shown on the most recent Current Operating Plan (COP)
- ☐ Expected Contracts – The expected peak hour energy transfer based on expected system conditions

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Step 2.5 Primary Responsibility: Senior System Operator

Enter the Weather Conditions, Wind, and High Temp for Peak Hour.

Notes

The Weather Forecast Summary used by the Forecaster to update the COP for the peak hour contains the information to be used for Boston and Hartford.

Step 2.6 Primary Responsibility: Senior System Operator

Enter the Geomagnetic Disturbance Activity information.

Instructions

Enter the following:

- ☐ Forecasted: Enter "Yes" if a GMD is forecasted.
- ☐ Alert: Enter "Yes" if an actual GMD event is in effect.
- ☐ Intensity: Use the Storm Alert Intensity Rating that is displayed in the GSMS software.
- ☐ Observed GMD Activity: Use the Observed Kp value, the blue line on the trend display in GSMS software. (use the most recent observed Kp value)

Notes

In the Background section of CROP.24003 Geo-Magnetic Disturbance it states "An Actual GMD event is reported as an actual event, forecasts and warnings are reported as Alerts". There is a difference between STD GSMS and the Morning Report software. Warnings and forecasted events are entered in the Forecast block and actual events are entered in the Alert block.


Step 2.7 Primary Responsibility: Senior System Operator

Enter the information in the Units committed for min operating reserve and replacement reserve area.

Instructions

Enter the following information:

- ☐ Number of resources committed to meet minimum Operating and total Replacement Reserve requirements.
- ☐ Number of MW (sum of Eco Max and Max Red) associated with the committed resources.

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Step 2.8 Primary Responsibility: Senior System Operator

Enter the required information in the Capacity Analysis Information area.

Instructions

Below describes where the enterable information is found and which fields are calculated non-enterable fields:

- A. **Capacity Supply Obligation (CSO):** from the CSO line of the CAPSYS application.
- B. **Capacity Additions EcoMax bid > CSO:** from the "Generator Capacity Additions" dropdown menu of the CAPSYS application or the ISO-NE Forecast Capacity Analysis software; use the most accurate number
- C. **Generation Outages and Reductions:** from the "Generator Outages", "Online Generator Reductions", and "Offline Generator Reductions" drop down menus of the CAPSYS application.
- D. **Uncommitted Available Generation (non Fast Start):** from "Generators in UCM2" menu of the CAPSYS application.
- E. **DRR Capacity:** from the "Total DRR Available MW" line of the CAPSYS application
- F. **Uncommitted Available DRR:** from the "Total Non-QFS DRR MW" line of the CAPSYS application
- G. **Capacity Deliveries** [Net Purchases are (-), Net Sales are (+)] is transferred from the information entered in step 2.4.
- H. **Total Available Capacity:** calculated by $(A + B - C - D + E - F - G)$
- I. **Forecasted Peak Load Hour and Peak Load:** value as shown on the most recent COP.
- J. **Total Operating Reserve Requirement:** Calculated by $(\text{Ten Minute reserve } \%) * (\text{first contingency loss}) + (50\%) * (\text{second contingency loss})$
- K. **Capacity Required:** Calculated by $(I + J)$
- L. **Surplus/Deficiency** [Surplus = (+), Deficiency = (-)]: Calculated by $(H - K)$
- M. **Replacement Reserve Requirement:** A MW value.
- N. **Excess Commitment** [Surplus = (+), Deficiency = (-)]: Calculated by $(L - M)$

Step 2.9 Primary Responsibility: Senior System Operator

Enter the MW value of the largest first contingency.

Instructions

The largest first contingency MW value is entered in the "Size of the largest first contingency" field.

Step 2.10 Primary Responsibility: Senior System Operator

Enter the MW value of the largest second contingency.

Instructions

The largest second contingency MW value is entered in the "Size of the largest second contingency" field.

Step 2.11 Primary Responsibility: Senior System Operator

Verify the appropriate value is entered in the "Ten minute reserve percentage" field.

Step 2.11.1 Primary Responsibility: Senior System Operator


Condition(s) to perform this step:

- The value entered in the "Ten minute reserve percentage" field is incorrect.

Enter the current required Ten minute reserve percentage.

Instructions

The current required Ten Minute Reserve Percentage is entered in the "Ten minute reserve percentage" field.

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Step 2.12 Primary Responsibility: Senior System Operator

Enter the A.M.S. Peak Load Exposure value.

Instructions

The AMS Peak Load Exposure value is obtained from the “50/50 Study Loads” spreadsheet located on the “LCC Information” website. This file can be accessed from the Control Room homepage at [Operational Tools > Peak Load Exposure](#).

Step 2.13 Primary Responsibility: Senior System Operator

Enter the expected OP-4 Actions to be implemented.

Notes

To correctly load the webpage each OP-4 Action should be entered followed by a comma (Example: 1,2,3,4...)

Step 2.14 Primary Responsibility: Senior System Operator

Enter the expected additional capacity MW amount from the expected OP-4 Actions to be implemented.

Notes

Ensure the OP-4 Appendix A MW amount entered is load corrected.

Step 2.15 Primary Responsibility: Senior System Operator

Indicate the availability of SAR from NYISO.

Instructions

If NYISO can provide SAR check the box.

Notes

By checking the box it indicates that NYISO can provide at least 300 MW of SAR to New England.

Step 2.16 Primary Responsibility: Senior System Operator

Enter the MW amount of non-commercial generators that are expected to be testing at peak.

Step 2.17 Primary Responsibility: Senior System Operator

Enter the GMD Actions Taken or Planned by ISO-NE.

Instructions

- ☐ Actions taken or planned by ISO-NE are entered in the "GMD Actions Taken or Planned by ISO-NE" text box.
- ☐ If GMD Activity \geq Kp-6 was observed or is forecasted, the following wording shall be entered: “Following the guidance contained in CROP.24003 - Geo-Magnetic Disturbance”
- ☐ If there is **no** activity or the observed/forecasted activity is $<$ Kp-6, enter "None".

Step 2.18 Primary Responsibility: Senior System Operator

Enter the GMD Actions Taken or Planned by Other Control Areas.

Instructions

- ☐ Actions taken or planned by other Control Areas are entered in the "GMD Actions Taken or Planned by other Control Areas" text box.
- ☐ Any GMD Actions are Taken or Planned by other Reliability Coordinator Areas the actions or plan information is entered.
- ☐ If **no** actions have been taken or planned enter “None”.

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Step 2.19 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- At the discretion of the Operations Shift Supervisor.

Enter any additional notes of interest.

Instructions

This would include, but **NOT** limited to, major transmission outages, system interconnection information, highlights of previous day operations and any general information.

Notes

- Text entered in this field will be copied when a new case is created. If the note is **no** longer applicable, remove the note.
- This is **NOT** part of the External Morning Report but is published on the Internal Morning Report.

Step 2.20 Primary Responsibility: Senior System Operator

Enter any case comments that are specific to case.

Notes

- Text entered in this field will be copied when a new case is created. If the comment is **no** longer applicable, remove the comment.
- This is **NOT** part of the Morning Report that is published anywhere because of confidentiality issues. Comments entered here will only be seen if the case is accessed later.

Step 2.21 Primary Responsibility: Senior System Operator

Enter Major Units or DRRs Out of Service.

Instructions

- ☐ Generators with a CSO of 100 MW or more and DRRs with an SCC of 100MW or more are entered in the Out of Service area on the Outage Data tab.
- ☐ Enter Generator/DRR, CSO MW (SCC for DRR), start date and scheduled end date. If the Out of Service was planned, list the letter "P" (for Planned) in the P/UP column, if it was **NOT** planned, list the letters "UP" (for Unplanned).

Notes

- This is **NOT** part of the External Morning Report but is published on the Internal Morning Report.
- The Unit, MW, Start of Reduction and Expected Back fields are required to be filled out. The software will **NOT** report outage information if the required fields are **NOT** entered.

Step 2.22 Primary Responsibility: Senior System Operator

Enter Major Unit or DRR Reductions.

Instructions

- ☐ Generator Reductions of 50 MW or more below the CSO and DRR Reductions of 50MW or more below the SCC are entered under the reductions area on Outage Data tab.
- ☐ Enter Generator/DRR, reduction amount from CSO MW (SCC for DRR), start date and scheduled end date. If the reduction was planned, list the letter "P" (for Planned) in the P/UP column, if it was **NOT** planned, list the letters "UP" (for Unplanned).

Notes

- This is **NOT** part of the External Morning Report but is published on the Internal Morning Report.
- The Unit, MW, Start of Reduction and Expected Back fields are required to be filled out. The software will **NOT** report outage information if the required fields are **NOT** entered.



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Step 2.23 Primary Responsibility: Senior System Operator
Save the case.

Notes

When you close the application you will **NOT** be prompted to save your work, the application will just close and you will lose your work.

ISO newengland	CROP.50005 Capacity Analysis and Morning Report	
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Condition(s) to perform this section:

- A Morning Report has been created and is ready for review prior to approval.

Section 3: Review and Publishing of the Morning Report

Standard(s) for completion:

- The Preliminary Morning Report is issued prior to 0600.
- The Morning Report is issued prior to 0900.

Step 3.1 Primary Responsibility: Senior System Operator

Notify the Operations Shift Supervisor a Morning Report case has been saved and needs to be reviewed.

Notes

Review can be performed internal to the software or print out a copy for Operations Shift Supervisor review.

Step 3.2 Primary Responsibility: Operations Shift Supervisor

Review the saved case or printed copy and notify the Senior System Operator if there are any issues or if it can be approved and published.

Step 3.3 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- The Operations Shift Supervisor has approved the Morning Report for publishing.

Approve and publish the Morning Report.

Instructions

The button “Publish and Approve Case” will approve the case and publish both the Internal and External Morning Report.

Notes

Once the Morning Report has been approved and published, a new case must be created if changes are required after approval.

Step 3.3.1 Primary Responsibility: Senior System Operator

Verify the Internal and External Morning Reports were published.

Instructions

If the Internal or External report does **NOT** publish, re-perform Step 3.3.

Notes

It may take a few minutes for the External to publish.

Step 3.4 Primary Responsibility: Senior System Operator

Condition(s) to perform this step:

- Problems are encountered with approving and publishing the Morning Report.

Notify the IT On Call Technician.

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Revision History

Rev. No.	Date (MM/DD/YY)	Reason	Contact
-	06/14/17	For previous revision history, refer to Rev 7 available through Ask ISO	Steven Gould
8	03/06/18	Biennial review and change to annual review	Steven Gould
9	05/16/18	Changes made for PRD project	Steven Gould
10	06/27/18	Added steps in section 1 for notifying the Forecaster of the DRR >30 value	Steven Gould
11	05/22/19	Edited Section 1 based on EMS 2.6.21 Network Model Release CAPSYS updates	Steven Gould
12	09/10/19	Changed Step 2.3 to provide new data retrieval instruction. Reformatted bulleting of listed items	Steven Gould
13	11/17/20	Updated “Valid Through” date to be consistent with Rev 8 and annual review	Steven Gould
14	12/22/20	Added Step 1.11.3 to compare SCRA Transactions to DA	Steven Gould
15	04/28/21	Updated references, removed inaccurate note in background, added instructions to 2.12 to identify the new location for Peak Load Exposure.	Steven Gould
16	04/12/23	Updated Common Procedure Information, Corrected name of AMS Peak load exposure file location, updated hyperlink for the peak load exposure, Added Instructions to Steps 1.8.2 and 1.9.1.	Jonathan Gravelin
17	10/04/24	Added instructions and notes to Steps: 1.4, 1.5, 1.6, 1.7 and 1.8.1; Modified Step 1.11.2 and added instructions; Deleted Step 1.18	Jonathan Gravelin