



Working to Perfect the Flow of Energy

PJM InSchedule User Guide

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Prepared by
Markets Applications

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PJM User Guide: PJM InSchedule

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Approval

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Current Revision

Revision 001 (08/29/2012/1/2015)
Update InSchedule Submission Deadlines per the business rules approved by the Market Implementation Committee on August 6, 2014..Create new User Guide for the new InSchedule application updates.



Introduction

Welcome to the ***PJM User Guide for PJM InSchedule***. In this Introduction, you will find the following information:

- What you can expect from the PJM Manuals in general (see “*About PJM Manuals*”).
- What you can expect from this PJM User Guide (see “*About This User Guide*”).
- How to use this User Guide (see “*Using This User Guide*”).

About PJM Manuals

The PJM Manuals are the instructions, rules, procedures, and guidelines established by PJM for the operation, planning, and accounting requirements of the PJM RTO and the PJM Energy Market. The manuals are grouped under the following categories:

- Transmission
- PJM Energy Market
- Generation and transmission interconnection
- Reserve
- Accounting and Billing
- PJM administrative services

For a complete list of all PJM Manuals, go to www.pjm.com and select “Manuals” under the “Documents” pull-down menu.

About This User Guide

The ***PJM User Guide for PJM InSchedule*** focuses on the PJM Internet application, called “PJM InSchedule”.

PJM InSchedule supports the Interchange Energy Market and provides the ability to create PJM internal energy contracts and schedules. PJM InSchedule allows users to create or report four types of internal energy transactions: Internal Bilateral Transactions (IBT), Retail Load Responsibility (RLR), Wholesale Load Responsibility (WLR), and Merchant Generation (GEN). All external transactions (i.e. those that cross PJM’s borders) must be scheduled with PJM through the EES System.

The ***PJM User Guide for PJM InSchedule*** consists of one section. This section is listed in the table of contents beginning on page ii.

Intended Audience

The intended audiences for the ***PJM User Guide for PJM InSchedule*** are:

- *Internal Energy Market Participants* — Marketers and LSEs buying or selling energy within the PJM Market.



- *Load Aggregators* — The Load Aggregators (also known as Electric Generation Suppliers or EGSs) are responsible for entering, confirming, and updating energy Contracts and Schedules.
- *Electric Distribution Companies* — The Electric Distribution Companies (EDCs) also are responsible for entering, confirming, and updating energy Contracts and Schedules.
- *PJM Market Settlements* — The PJM Market Settlement Operations Department uses the data entered by the Load Aggregators and EDCs to calculate interchange, produce bills, and publish summary data.
- *PJM Customer Relations and Training Department* — The PJM Customer Relations and Training Department processes requests from Load Aggregators to participate in the Customer Choice Program and maintains participant information.

References

The references to other documents that provide background or additional detail directly related to the PJM User Guide for **PJM InSchedule** are:

- PJM Manual for [Scheduling Operations \(M-11\)](#)
- PJM Manual for [Open Access Transmission Tariff Accounting \(M-27\)](#)
- PJM Manual for [Operating Agreement Accounting \(M-28\)](#)
- PJM Manual for [Billing \(M-29\)](#)
- PJM Manual for [Administrative Services for PJM Interconnection Agreement \(M-33\)](#)
- On-Line Help Screens of the InSchedule Application

Using This User Guide

We believe that explaining concepts is just as important as presenting procedures. This philosophy is reflected in the way we organize the material in this user guide. We start each section with an overview. Then we present details, procedures or references to procedures found in other PJM user guides or PJM manuals. The following provides an orientation to this user guide's structure.

What You Will Find In This User Guide

- A table of contents that lists two levels of subheadings within each of the sections
- An approval page that lists the required approvals and a brief outline of the current revision
- A section containing specific guidelines, requirements, or procedures including PJM actions and PJM Member actions



Section 1: PJM InSchedule

Welcome to the *PJM InSchedule* section of the PJM User Guide for ***PJM InSchedule***. PJM InSchedule is an information system developed by PJM as an Internet-based application. It allows Load Aggregators and EDCs to provide and obtain information needed to schedule Internal Transactions as well as load responsibilities for LSEs not fully metered to PJM.

In this section you will find the following information:

- (see “InSchedule Functions”)
- (see “*Log In*”)
- A list of PJM rules and guidelines related to Contracts (see “*Rules and Guidelines*”)
- How to create, locate, confirm, and modify an internal Contract (see “*Contracts*”)
- How to create, locate, confirm, modify, upload, and download Schedules (see “*Schedules*”).
- A discussion of the basic principles related to files transfers (see “*File Transfers*”)
- A discussion of the basic principles related to reports (see “*Reports*”)

1.1 InSchedule Functions

- *Contracts* - allows you to create an agreement between two parties to create schedules for a designated period of time.
- *Schedules* - allows you to create energy schedules consisting of 24 MWh values per day. Schedules must be created for a specific contract.
- *Reports* - allows you to download PJM reports (Note: The majority of the InSchedule reporting functionality was replaced by the MSRS Tool in August 2008.)
- *File Transfers* - allows you to upload InSchedule data.

1.2 Log In

The Log In function provides security for the InSchedule application and databases by ensuring that only registered users have access to InSchedule. The Log In function also determines which parts of the application can be accessed by the user and which navigation options are available. Log In is performed using the eSuite Customer Account Manager (CAM) System.

1.3 Rules and Guidelines

The following is a list of business rules and guidelines to follow when working with reported Contracts in InSchedule.

- All Contracts must be confirmed by both parties entering into an agreement.
- Contracts may be established with dual or unilateral Schedule confirmation. Under a dual Contract, all schedules must be confirmed by both parties. Under a unilateral Contract, one party (either the buyer or the seller) is given confirmation rights to all energy schedules between the parties.



- Contracts cannot be created with a start date earlier than the previous business day at the time of the Contract's inception.
- Source and Sink data fields should be assigned as the point of receipt of the energy (Source) and the point of delivery of the energy (Sink).
 - Requests for the creation of aggregate pnode locations for use in InSchedule and other eTools should be mailed to the PJM Market Settlement Operations Department, mrkt_settlement_ops@pjm.com. The request should include the following information:
 - The desired aggregate pnode name (19 character maximum)
 - The desired fixed weighted aggregate pnode definition. Note: The definition should sum to 100%. For example, 100% bus pnode A or 50% bus pnode A and 50% bus pnode B.
 - A brief description of the reason for request
 - Due to inter-PJM department coordination, a minimum lead time of 5 business days prior to the first day of availability in InSchedule is required.
- PJM is not responsible for policing Contracts to ensure that agreements are met. The terms of all Contracts are the responsibilities of the parties involved.
- Multiple Schedules can be entered for a Contract.
- Schedules cannot be entered more than a year in advance.
- Schedules can be entered in 0.001 MWh increments.
- All Schedules must be entered by the deadlines specified.
- Schedules can be created under a pending Contract, but cannot be confirmed until the Contract has been confirmed.
- For unilateral Contracts, only the authorized party is allowed to create new Schedules and make changes to Schedules.
- Schedules can be added, modified, and confirmed by File Uploads, but Contracts cannot.
- Any modifications to the schedules ~~from the previous day(s)~~ must be completed before the following daily accounting deadlines (all times Eastern Prevailing):
 - 4:00 PM for schedule changes from two business days prior.
 - Monday-Thursday Operating Days due two business days later, by 4:00 PM.
 - Friday – Sunday Operating Days due on the following Tuesday, by 4:00 PM. In the event a stakeholder approved holiday falls on Monday or Tuesday, Friday – Sunday Operating Day data is due on Wednesday, by 4:00 PM.
 - Modifications to schedules for the Wednesday that precedes consecutive holidays that fall on a Thursday and Friday are due no later than 4 PM the following Monday.
 - ~~2:00 PM (Tuesday – Friday) for schedule changes from the previous day~~
 - ~~5:00 PM (Monday) for schedule changes from Friday, Saturday, and Sunday~~

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~~5:00 PM (a day after the holiday) for schedule changes from the previous day~~

- Stakeholder approved holiday deadline extensions are posted on the PJM Web site, <http://www.pjm.com/markets-and-operations/market-settlements/guides-forms.aspx>.
- The PJM Market Settlement Operations Department, mrkt_settlement_ops@pjm.com, should be contacted if a participant is experiencing technical issues that may cause them to miss a data submittal deadline.
- Bilateral transactions for the physical transfer of electric energy may be reported to PJM. Such reported bilateral transactions must be for the physical transfer of electric energy and must be reported to PJM as Internal Bilateral Transactions as described below under Contracts.
- Payments and related charges associated with bilateral transactions reported to PJM shall be arranged between the parties to the bilateral transaction.
- A buyer under a bilateral transaction reported to PJM agrees that it guarantees and indemnifies PJM, PJMSettlement, and the market participants for the costs of any Spot Market Backup, as determined by PJM, to supply the reported bilateral transaction and for which payment is not made to PJMSettlement by the seller.
- Upon any default in obligations to PJM or PJMSettlement by a Market Participant, PJM shall not accept any new bilateral transaction reporting by the Market Participant and shall terminate all of the market participant's reporting of eSchedules associated with its bilateral transactions previously reported to PJM for all days where delivery had not yet occurred.

1.4 Contracts

The Contracts functional area of InSchedule allows you to report and modify, or confirm a reported agreement with another PJM member to create schedules of hourly energy transactions.

To access the Contracts area, click the Contract tab from the Dashboard.

- Reporting a new contract.
- Locating or downloading an existing reported contract.
- Confirming an existing reported contract.
- Modifying an existing reported contract
- Deleting an existing reported contract.

1.4.1 Reporting a new contract

Use the following steps to report a new Contract:

1. From the InSchedule Dashboard, click the 'New Contract' button above the Dashboard. The new contract window will open



2. On the Contract Information window, enter a contract name in the Name field (required). The Contract Name can be any alphanumeric name you choose.
3. Use the calendar to enter a date in the Start Date field. The default value is today's date.
4. Use the calendar to enter a date in the Stop Date field. The Stop Date you enter must be on or after the Start Date of the Contract. The default value is today's date.
5. Select a Pricing Type (Day-Ahead or Real-Time).
6. Select a seller name from the drop-down list in the Seller field.
7. Select a buyer name from the drop-down list in the Buyer field. Seller and Buyer cannot be the same.
8. Select a Schedule Confirmation Type. The Schedule Confirmation Type determines which party(s) (Buyer, Seller, or Dual) must provide confirmation for the schedules created within the contract
9. Select a Service Type.

Service Types for InSchedule Contracts are RLR, IBT, WLR, and GEN:

RTL LD RESP	=	Retail Load Responsibility
INT BIL TRAN	=	Internal Bilateral Transaction
WHL LD RESP	=	Wholesale Load Responsibility
GENERATION	=	Merchant Generation (requires PJM approval)

PJM determines retail load responsibility for LSEs based on contracts with the InSchedule Service Type RTL LD RESP (RLR). Energy schedules under RLR contracts are used to calculate loads and resulting Load Ratio Shares (LRS) for the calculation of ancillary services charges.

Service type INT BIL TRAN is used to designate all reported bilateral energy transactions, including supply transactions for parties serving retail load. Service type WHL LD RESP is used to determine load responsibility and resulting LRS for wholesale entities not currently fully metered to PJM. Service type GENERATION is used to designate supply schedules for generators being billed directly by PJM. Use of WHL LD RESP and GENERATION service types must be coordinated with the PJM Market Settlement Operations Department.

10. Begin typing the first two letters of the Source and select an aggregate node from the drop-down list in the Source field.
11. Begin typing the first two letters of the Sink and select an aggregate node from the drop-down list in the Sink field.

12. Enter notes in the Comments field (optional).
13. Click 'Confirm'.

Once you click 'Confirm', the new contract will appear on the window and it will be assigned a unique ID. If the contract is not submitted successfully, an error message will appear with a description of the problem. Once the contract is successfully submitted, only the Stop Date can be modified. Comments can be added.

1.4.2 Locating or Downloading an Existing Reported Contract

Use the following steps to locate or download an existing reported contract:

1. Locate a reported contract using one of the 5 search methods after selecting the Contract tab on the Dashboard:
 - **Enter a Contract ID:** Enter the ID number in the Contract ID entry field at the top left side of the dashboard and click the enter button on the tool bar. Begin typing the first number of the Contract ID and click enter. A list of all the contracts starting with that number will appear. To clear that list clear out the entry box and click enter again.
 - **Select a Contract ID:** Select an ID name/number from Contract ID List on the Dashboard. Any contract show in Orange is a pending contract; any contract appearing in Red has a stop date within 14 days. To see only pending contracts, click the 'Pending Only' check box at the top left of the dashboard. This list displays the current valid contracts. To view contracts for a future or past date, change the sort from Ascending to descending on the upper date tool bar by clicking on date. **Enter a Contract Name:** Enter a name in the Name entry field and hit enter. By typing only a few characters in and hitting enter; a list of possible choices will come up that have those letters in the name.
 - **Select a Company:** Select a name from the Company drop-down list under the Buyer or Seller columns to narrow down the search,
 - **Enter a Date:** Bring up contracts valid on one specific day by entering that date in the 'from' and 'to' date boxes on the top left and click the update box.
2. Download Reported Contracts
 - To download reported contracts to a comma-delimited text file, click the 'Download' button at the top right of the Dashboard. This will open the 'File Download', 'Unknown File Type', or some other pop-up window, depending on which browser you are using. Use the pop-up browser windows to save the download file.

1.4.3 Confirming a Reported Contract

1. On the Dashboard, click the 'Pending Only' check box and select the 'Update' button. This will bring all the pending contracts to be confirmed into the window.
2. Click the 'Confirm' button.

1.4.4 Modifying a Reported Contract

When modifying a reported contract, only the Stop Date and Comments can be edited.

1. Find the Contract using the steps for [Locating an Existing Contract](#). This will open the Contract Information window for the selected contract.
2. To change the Termination Date, Select the 'Propose New' button and a calendar pop-up window appears. Select a new date in the Stop Date field and select 'Submit' or 'Cancel' to cancel the change. (Both parties must confirm.)
3. To enter new notes about the comment, go to the Comments tab and type in the Comments field. The most recent comment will appear at the bottom of the main Contract screen. In this screen, users can see the history of updates, comments, and add or confirm schedules.
4. Click 'Confirm'.

1.4.5 Deleting a Reported Contract

Technically, you cannot delete a reported contract, but you can terminate a reported contract. To do so, you must change the contract's termination date to the current date. This will effectively 'delete' the contract because it will expire at the end of the day. However, before the new expiration date takes effect, the second party must confirm the new termination date as well.

1. Find the contract using the steps for [Locating a Reported Contract](#).
2. On the Contract Information window, Click 'Propose New' button, and enter today's date in the New Stop Date field.
3. Click 'Submit'.
4. Once the second party confirms the new stop date, the contract will be terminated.

1.5 Schedules

Through InSchedule, you can create, locate, confirm, modify, and download Schedules. The paragraphs below provide an overview of these functions; detailed instructions are available on the InSchedule Web page under training

The Schedules functional area of InSchedule allows you to create hourly energy transactions for an existing Contract.

- To access the Schedules area, login to InSchedule. The first page is the Dashboard which defaults to the Schedules list. Creating a new schedule
- Locating an existing schedule
- Confirming an existing schedule
- Modifying an existing schedule
- Deleting an existing schedule
- Schedule Assistant
- Daylight Savings Time
- Schedules – Window and Field Help

1.5.1 Creating a New Schedule

Before you can create a schedule with another party, there must first be a reported contract between you and that party. Once the reported contract is confirmed you can confirm schedules for the reported contract. Schedules can only be created for one day at a time. Use the following steps to create a new schedule:

1. Go to the contracts tab and select the contract (See the above sections for locating contracts).
2. Once in the Contract window, select the Schedules tab. From this window a user can add new, update, or download a schedule. There is also a multiday schedule option.
Note: schedules can be created for both pending and confirmed reported contracts. However, schedules created for pending reported contracts cannot be confirmed until the contract is confirmed.
3. Once in the Schedule screen, click on the pencil to the far right to add new schedules. This opens an Edit Schedules screen. To add a new schedule, change the date by using the arrow to the right of the date. A new window appears with block open for a new schedule. Note: If you use the 'Change Schedule Date' it will only change the date of the current schedule the user is in,
4. Once you have entered the new MWh amounts, click 'Confirm' to submit the schedule. The new amounts will appear in the Pending MWh column until the other party confirms the schedule. (Exception: if the contract is unilateral, and you are the confirming party, the new MWh values are automatically confirmed.)
 - If a New MWh field is left blank, and there is no value in the corresponding Pending MWh field, the blank field is assumed to be zero MWh.

- If a New MWh field is left blank, there is an existing value in the corresponding Pending MWh field, the blank field is disregarded and the existing value remains.

To create schedules for a previous or future date, use the arrow buttons. If a schedule already exists for the previous/next day, the schedule information is displayed, otherwise a blank schedule appears.

1.5.2 Locating an Existing Schedule

Use the following steps to locate an existing schedule:

1. Use ONE of the following search methods:
 - **Enter a Contract ID:** Enter a valid contract ID in the Contract ID field. Searches based on Contract ID will locate all schedules created under the contract within the specified date range (see below).
 - **Select from a List of Schedules on the Dashboard:** Use the Dashboard to select from a list of Dates, companies, or contracts to locate a particular schedule. By using one of the dropdown lists, select the appropriate Buyer, Seller, or Confirm.
 - **Select only pending schedules:** At the top of the screen, select the 'Pending Only' box and click update. All the Pending Schedules will appear on the screen.
2. Once a schedule is selected, click on the schedule to go to the Edit Schedules screen. Here the user can update schedules, add schedules, confirm, or just review the existing schedules. A user can toggle through dates by using the arrows at the top to go back or forward from the current date.
3. When a contract is selected, the next visible screen is the contract screen. Click on the Schedules tab to review all schedules for one contract.
 - Click the arrows at the top of the column in the header box to sort; OR
 - Click 'Multi-day Schedule' to create the \ schedules for one specific time period; OR
 - Click 'Download Schedule(s) to view a comma-delimited file containing the schedules that match your search criteria; OR.
 - Use the calendar to find a specific date and click 'Go'.
4. The Schedule Date on the Schedule List window is a hyperlink to more detailed information about the schedule. Click this link to open the Schedule Information window. This window displays contract information, schedule details, and hourly MWh amounts, and allows you to confirm the Schedule.

1.5.3 Confirming an Existing Schedule

To confirm a schedule that has been created or modified by the opposite party, use the following steps:

1. Find the Schedule using the steps outlined in the instructions on [Locating an Existing Schedule](#).
2. On the Edit Schedule window, review the schedule details and click 'Confirm' to finalize the schedule. The Pending MWh amounts will be updated to Confirmed.

If the opposite party enters new MWh values for the confirmed schedule, the status returns to pending and you must confirm the schedule again.

1.5.4 Modifying an Existing Schedule

Schedules can be relatively dynamic because parties are allowed to change MWh information as often as they choose. If the reported Contract confirmation type is 'dual', then all changes to existing schedules must be confirmed by both parties. In the case of unilateral contracts, the confirming party can change the confirmed MWh values at any time without confirmation from the opposite party. The only constraints on modifying schedules are the time-based deadlines, which are defined under Rules & Guidelines.

1. Find the Schedule using the steps outlined in the instructions on [Locating an Existing Schedule](#).
2. On the Edit Schedule window, enter new values in the New (MWh) fields. You may enter the new values one-by-one or use the Multi-day Schedule option to create a same schedule for a time period.
3. Click 'Confirm'. If the contract confirmation type is 'dual', the new MWh values will shift to the Pending (MWh) column. If the contract confirmation type is 'unilateral', the new MWh values will shift to the Confirmed (MWh) column.

1.5.5 Deleting an Existing Schedule

Technically, you cannot delete a schedule, but you can eliminate all MWh from the schedule, creating a schedule with no energy. To do so, enter "0" for all of the hourly MWh segments one at a time, or use the [Schedule Assistant](#), and then click 'Confirm'. The Schedule Information window will be regenerated with the updated information.

1. If the associated contract requires dual confirmation for its schedules, the newly entered MWh values will appear in the Pending (MWh) column and the opposite party's status will be updated to 'pending'. The opposite party must confirm the change before the schedule can be 'deleted'.
2. If the associated contract requires unilateral confirmation for its schedules, the newly entered MWh values will appear in the Confirmed (MWh) column and the schedule is effectively 'deleted'.

1.5.6 The Schedule Assistant

The Schedule Assistant offers a fast and easy mechanism for updating a series of hourly MWh segments with the same MWh value.

1. Enter a beginning hour in the From field



2. Enter an ending hour in the To field
3. Enter a MWh value in the Amt field
4. Click 'Fill' to enter the MWh amount into the selected range of hourly segments

Example: To enter 20 MWh from 1:00 AM to 1:00 PM, enter "1" in the From field, "13" in the To field, and "20" in the Amt field, then click 'Fill'. "20" will appear in the New (MWh) from the 1-2 hour block through the 12-13 hour block.

To clear all of the New (MWh) fields, click 'Clear All'

1.5.7 Daylight Savings Time

Fall Back

When creating schedules for the first Sunday in November, an additional hour block from 1:00 AM to 2:00 AM appears on the Schedule Information window. Users may enter an additional MWh value for this hour block. An asterisk indicates that this field has been added for the transition from Daylight Savings Time.

Spring Forward

On the second Sunday in March, the hour from 2:00 AM to 3:00 AM does not appear for the transition to Daylight Savings Time.

File Transfers

File Transfers must be formatted according to the format requirements in the File Upload Format Definition Document, which is located at: <http://www.pjm.com/markets-and-operations/etools/inschedule.aspx>

1.6 File Transfers

The File Transfers functional area is used to upload the following types of data into eSchedules:

- Internal Schedules
- Energy Reconciliation

1.6.1 Rules and Guidelines

- The file is rejected as a whole if there is an error in any one section of the file.
- User qualifications may restrict participants from uploading certain types of data. Users will receive an error for the entire file if it contains a restricted data type.

1.6.2 Internal Schedules

Allows users to insert new schedules, update existing schedules, and confirm schedules. These operations can be performed for a range of dates by specifying a start and stop date. The same schedule will be applied to every single day from the start day to the stop day.

(Note: contracts cannot be created, modified, etc. through file transfers.) All [InSchedule](#) users can submit this data.

- To upload a schedule for a contract, user must be a party to the specified contract.
- Start date of schedule must fall within the effective dates of the contract.
- Stop date of schedule must be after the Start Date and before or on the End Date of the contract.

Insert New Schedule

If there is not a pending schedule in existence for a given contract and date, then the schedule information is inserted directly into the database and responsibility for confirmation is set to the party that did not perform the upload.

Update Existing Schedule

If there is a pending schedule for a given contract and date, then the schedule information in the database is updated to reflect the newly uploaded information. The responsibility for confirmation is transferred to the party that did not perform the upload.

Confirm Schedule

If there is a pending schedule for a given contract and date and all of the MWh values are the same between the pending schedule and the schedule uploaded by the confirming party, then the schedule is confirmed. A check will be made to determine if the responsibility for confirmation is transferred to the party that is performing the upload. If the responsibility for confirmation is not that of the uploading party, then nothing is updated.

1.6.3 Energy Reconciliation

Energy Reconciliation allows users to reconcile schedules for a load contract (RLR or WLR). All energy reconciliations are inserts. If there are any existing reconciliations for the contract on the date specified in the upload, the new data will overwrite the existing data.

- Multiple dates can exist for one Contract ID.
- Values must be submitted in kWh.
- The minimum amount is one kWh.
- Values can be negative (-).
- If the file transfer contains an occurrence of an hour range that overlaps with a prior occurrence, the last encountered occurrence will be the data loaded for those overlapping hours.
- Energy Reconciliation occurs on a 2-month lag. The deadline for submittal of energy reconciliation data in InSchedule is 23:59 on the last day of the billing month. For example, all reconciliation data for January must be submitted by March 31st 23:59.

1.6.4 Formatting a Transfer File

File Transfers must be formatted according to the format requirements in the File Upload Format Definition Document, which is located at:

<http://www.pjm.com/markets-and-operations/etools/inschedule.aspx> **Note:** this document is a PDF file, which may be viewed and printed through the Adobe Acrobat Reader.

1.6.5 Uploading a File

Once you have created a transfer file, use the following steps to upload the file. Note: you must have the required user qualifications to upload data using File Transfers.

1. Login to the InSchedule Dashboard.
2. Click the Upload File option located on the upper right side of the window.
3. On the Upload File window, click the Browse button to locate the file. This will open a secondary window allowing you to browse for the file you want to upload.
4. Once you have located the file, select it and click 'OK'/'Open' so that the secondary window closes and the file name appears in the field to left of the Browse button.
5. A message will appear that your file has uploaded successfully or there will be error messages with details on why the file did not upload

“

6. Click Close to exit the window

1.6.6 File Transfer Errors

1. **Invalid Contract ID:** The schedule starting at line # is invalid. A contract ID in the text file does not exist or contains invalid characters.
2. **Formatting Error(s) in File:** The schedule starting at line # is invalid. Some element within the text file was formatted incorrectly. Check the line number indicated in error message.
3. **Schedule Update Deadline Expired:** The Schedule starting at line # is invalid. It is too late to update the schedule specified in the text file. The application transfers schedules to the accounting department on a daily basis for schedules executed on the previous day. The transfer deadline is 24:00 p.m. ~~for all weekdays except for Monday, which has a deadline of 5:00 p.m.; there is extra time on Monday to reconcile all weekend activities.~~
4. **New Schedule Deadline Expired:** The schedule starting at line # is invalid. It is too late to create the schedule specified in the text file. The application transfers schedules to the accounting department on a daily basis for schedules executed on the previous day. The transfer deadline is 4:00 2:00 p.m. ~~for all weekdays except for Monday, which has a deadline of 5:00 p.m.; there is extra time on Monday to reconcile all weekend activities.~~
5. **Contract not Confirmed:** The schedule starting at line # is invalid. The schedule in the text file is for a reported contract that has not been confirmed. Contracts must be confirmed before schedules can be created under those contracts through file transfers.

1.7 InSchedule Reports

Click on 'Reports' at the top right side of the Dashboard. Once in the Reports screen, select the report name from the dropdown list. After selecting the report and the time period, select 'Download' or 'Cancel' to return to the Dashboard. The following reports are available in InSchedule:

- The EDC Hourly Loss Deration Factor report which can be located in the Transmission Losses report type category. This report is available to all InSchedule users and is updated on a next business day basis following the appropriate eMTR deadlines.
- The Reconciliation Data report which can be located in the Reconciliation report type category. This report is customer specific and should be used by participants to verify reconciliation data submissions. Both the buyer and seller on the reconciliation contract data are able to retrieve this report.
- Company Static Data which provides a list of Participant Names, Short Names, and Org ID's.



1.7.1 Rules and Guidelines

- Participant's can only download their own company's reports, if applicable.
- InSchedule reports cannot be viewed on the InSchedule screens. You must download and import report files into a spreadsheet program.

1.7.2 Downloading Reports

File Transfers must be formatted according to the format requirements in the File Upload Format Definition Document, which is located at. <http://www.pjm.com/markets-and-operations/etools/inschedule.aspx> (Note: this document is a PDF file, which may be viewed and printed through the Adobe Acrobat Reader.)

Qualifications for downloading reports

Reports are accessible to participants based the user company and user qualifications.

The 'Reports-Only' users may log in through InSchedule but are restricted to only the 'Reports' functional area.



Revision History

Revision 00 (08/29/12)

Created a new document for the refreshed application that was previously eSchedules and is now InSchedule. Updated the application Functionality in accordance with the new application screens and windows, Business rules have stayed the same. This is the first release of the PJM Manual for ***PJM InSchedule***