eLRS Release Notes

These eLRS release notes are meant to provide a brief description of changes to the eLRS application that impact users. Please see the eLRS User Guide located on the webpage http://www.pjm.com/markets-and-operations/etools/elrs.aspx for a more complete description. The User Guide will be updated over time as eLRS is enhanced based on User suggestions.

1. Release 12/16/2014
   1.1. User Interface and Web Services
      1.1.1. Emergency Registrations
         • Lead Time – 30 Minutes is now mandatory for 2015/2015 Delivery Year - The software has been updated to default Lead time to Quick_30. If Short_60 or Long_120 is selected, the user must choose the reason for the exception, enter supporting Comments with details as to why the 30 minute lead time cannot be met, and check a box certifying the necessary documentation to support the request is available. Please see documentation here for additional information.
         • Load Management registration “Completed” checkbox – Load Management registrations may now be marked as “Completed” when the CSP has finalized a registration and wants to send the data to eRPM so it can be used in transactions. After marking the registration as “Completed”, the registration can no longer be terminated and the following fields may not be edited: Product, RPM Resource, Capacity Loss Factor, Load Reduction Method and Managed Load. The following fields are still editable until the start of the Delivery Year: Lead Time, Resource Type, Strike Price and Shutdown Costs. Note: Registrations marked “Completed” will not be sent to eRPM prior to March 1st but after that date newly “Completed” registrations will be sent daily until the start of the Delivery Year.

2. Release 5/22/14
   2.1. User Interface
      2.1.1. Emergency Registrations
         • The following fields may now be edited by the CSP after the emergency registration is confirmed and before the start of the delivery year:

            Resource Type
            Lead Time
            Strike Price
            Shutdown Costs
            Product
            RPM Auction Resource
            Managed Load/ICAP

         • Resource Type
            • Pre-Emergency – most emergency registrations
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- Emergency – must have one location that meets the following generator attributes
  a) Load Reduction Method: Generator must be > 0
  b) Permit Type must be Emergency
  c) Permit Status must be Available

- Program Name Change
  - ‘Emergency DR Full’ will become ‘Load Management DR Full’
  - ‘Emergency Cap Only’ will become ‘Load Management Cap Only’

- Lead Times
  - New Lead Time: Quick_30
  - Rename current Lead Times to Short_60 and Long_120

2.1.2. Expected Reductions
- New columns have been added to capture Resource Type, Product and the new Lead Time names

2.1.3. Emergency Events
- ‘Zonal Emergency’ Events have been renamed to ‘Load Management Summary’ Events.
- Load Management Summary Events now include Product, the new Quick_30 Lead Time and Resource Type.
- ‘Test’ and ‘Re-Test’ Events now include Product and these events can only be created if the date of the test is within the Product’s allowed period for testing.

1.2. Web Services
1.2.1. Acknowledge Events
- The response when acknowledging events includes only the event id. Only events successfully processed are returned in the XML response.

1.2.2. Action Registration (changes registration data)
- Now allows changes to the same fields on the User Interface listed under Section 1.1.1.

3. Release 1/12/14
3.1. User Interface
3.1.1. Two new CBLs are available specifically targeted for variable loads: Same Day (3+2) and Match Day (3 Day Average).
3.1.2. The new Emergency Registration Products are now available (Extended Summer, Annual).
  - Products are required on emergency registrations but may be changed up until the Delivery Year begins
  - Emergency Events now support Products. Only the Limited Product may be called until the next Delivery Year starts (2014/2015).
3.1.3. The Duplicate Resolution process has been automated
  - Each CSP in the duplicate will receive an email and a Duplicate Resolution task that must be completed within five business days.
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- Registrations are automatically terminated or allowed to proceed based on the outcome of the Duplicate Resolution task
- PJM is no longer involved in the duplicate review process.

3.1.4. The LSE role has been removed from the settlement review process (FERC Order 745)

3.1.5. Expected Reduction (Shortage Pricing) download returns data for all zones as well as single zones

3.1.6. Managed Load may now be modified on emergency registrations after the registration is confirmed and before the start of the Delivery Year

3.1.7. CSP Review Denial Task has been corrected to allow modifications on all allowed fields (PLC, Managed Load, etc.)

3.2. Web Services

3.2.1. Web Services ‘Get Registration’ returns all registrations that are effective in the date range

3.2.2. Web Services now supports the Products on Emergency Registrations and Events

4. Release 8/15/13

4.1. User Interface

4.1.1. Expected real time energy load reduction uploads by CSPs with emergency registrations (aka Shortage Pricing) are now uploaded/downloaded through the Meter Data Management screen.

4.1.2. Implementation of Emergency DR M&V rule changes:
- Emergency M&V rules are now implemented for locations that have both an economic and emergency registration. The economic CBL will be used to determine the emergency energy reduction if the locations have an economic CBL.
- Emergency and economic overlapping settlement hours will be settled based on emergency energy compensation and cost allocation rules.
- Emergency Event Days are now excluded from economic CBL calculations.

4.1.3. Org and User Management/System Users (under the Tools tab) has been corrected to only display contacts that have been designated as Public Contacts. This makes it easier to find contacts at organizations and will make it much easier for EDCs, LSEs and CSPs to share their contact information to improve communication in the market.

4.1.4. New and enhanced CSP location data submission requirements for address, business segments, load reduction methods and generation attributes. CSP are required to provide this information on an accurate and timely basis.

4.2. Web Services

4.2.1. Electronic Notification for DR events has been enhanced to support Emergency Event notification.

5. Release 5/10/13

5.1. User Interface

5.1.1. Location City Field will now accept apostrophes.

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5.1.2. Data History now records the correct user when updates are completed.
5.1.3. An email is no longer sent when a Comment is added to a registration
5.1.4. An email is no longer sent when a CSP cancels a CSP Review Denial task

5.2. Web Services
5.2.1. Escalation emails are now sent when a RT Dispatch resource is re-dispatched with lower MW and the re-dispatch is unacknowledged.

6. Release 2/12/2013
6.1. User Interface
6.1.1. Settlement adjustments may no longer be submitted unless the Billing Cycle date is populated. The Billing Cycle reflects which bill the settlement appeared on.
6.1.2. Adjustments to settlements will no longer expire automatically if today’s date is more than 60 days after the event date.

7. Release 6/14/2012
This release is to comply with FERC Order 745 – Electronic Notification. Details of the functionality can be found at: http://pjm.com/training/~/media/training/core-curriculum/ip-dsr/order-745-electronic-notification-technical-training.ashx
7.1. Web Services
7.1.1. The ‘Get Event’ request has been modified to allow the CSP to check for unacknowledged Real Time Dispatch events.
7.1.2. A ‘Change Event’ has been created to allow the CSP to acknowledge receipt of RT Dispatch events.
7.1.3. If the CSP does not request a Get Event each minute, “heartbeat” escalation emails will be generated that go to users with a User Interest of ‘Communication Failure’.
7.1.4. Escalation emails will also be generated if the CSP has an unacknowledged RT Dispatch event.
7.1.5. An unsupported Web Services client that automatically sends a “heartbeat” and acknowledges RT Events can be requested by emailing dsr_ops@pjm.com.

8. Release 03/12/2012
This release is to comply with FERC Order 745.
8.1. User Interface
8.1.1. CBL Certification for Economic Registrations – FERC Order 745
- All economic registrations after 4/1/2012 must go through a CBL Certification (RRMSE) prior to submitting the registration for EDC/LSE review
- A new CBL Review task has been created to request PJM to review the CBL chosen for the registration when the default CBL is not accurate enough or there is an issue with data that requires PJM review and approval
- CBL Methods have been updated to include FERC-approved types and rules
- Settlements may not be submitted when there is an outstanding CBL Review
8.1.2. Dispatch Groups – FERC Order 745
- As of 4/1/2012, Dispatch Groups created in eLRS may be used for bidding in eMKT.

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- A single Dispatch Group may be bid into eMKT which represents one or more registrations in eLRS.
- Notification of Dispatch Group events will be done at the Dispatch Group level.
- Dispatch Group events will be used to create settlements at the registration level. The registration-level settlements will roll up to the Dispatch Group and be bridged to the Settlements group for billing.

8.2. Web Services

8.2.1. FERC Order 745 Support
- New Web Services have been added for RRMSE - create cblcalculation and GetCblcalculation
- Get Registration has been enhanced to return the registration’s Dispatch Group

9. Release 08/03/2011

9.1. User Interface

9.1.1. Compliance Meter Data Format Change
- Compliance data for emergency events for GLD or FSL registrations must now use the daily meter data format (24 hours per event, similar to emergency energy settlements) instead of the interval meter data format.
- Example meter data files can be found at: http://pjm.com/markets-and-operations/etools/elrs/elrs-meter-data-manage.aspx
- Compliance data requirements have not changed for DLC or Synchronized Reserve registrations.

9.2. Web Services

9.2.1. No changes

10. Release 06/13/2011

10.1. User Interface

10.1.1. Mandatory Emergency Test/Re-Test
- CSPs are now required to schedule their mandatory Test/Re-Test events in eLRS. CSPs are no longer required to send PJM an email notification of their upcoming Test or Re-Test event.
- Emergency Registrations now have a ‘Test Required’ flag on the Location tab that indicates if the registration is still required to test. Any registrations involved in a mandatory Emergency Event will have the flag turned off after the Event is over as the CSP no longer must submit Test data.
- Test/Re-Tests events are created by CSPs on the Event tab using the Action button.
- After the summer testing period is over CSPs will be able to change the status of one Test and Re-Test (if applicable) per zone to Confirmed. This will create the appropriate compliance records for each registration. Note: The timeframes for Mandatory Test/Re-Test Events and for uploading Compliance records remains unchanged.

10.1.2. Location Addresses

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- Location addresses may now be modified at any time by the CSP. The Location address must be the actual address of the location and NOT just the billing address for the location.

10.1.3. Tasks for Load Management Events
- Reminder Tasks are now created for each CSP for each Emergency Event. The ‘CSP Review’ task only serves as a reminder that compliance and emergency energy settlement data needs to be uploaded. The Task can be removed from the My Task page by clicking ‘Approve’ and then Actions/Complete Task.

10.2. Web Services
10.2.1. Mandatory Emergency Test/Re-Test
- New requests have been added to allow the CSP to schedule and confirm Test and Re-Test events. Please see the WS User Guide at http://pjt.com/markets-and-operations/etools/elrs/~media/etools/elrs/elrs-web-services-guide.ashx for additional information.

11. Release 05/28/2011
11.1. Infrastructure Upgrades

11.1.1. Infrastructure upgrades were performed to allow more effective implementation of future enhancements. These upgrades are transparent to users of eLRS.

11.2. User Interface

11.2.1. Orgs and Users
- System User information such as Name, E-mail address and telephone number can now be designated as Public. This allows users from other organizations to easily obtain contact information for Users in another organization. Each company will control which users, if any, are Public contacts and what specific type of role they have in the organization. It is expected this will take the place of the DR Contact List currently published at http://pjt.com/markets-and-operations/demand-response/~media/markets-ops/dsr/dsr-contact-list.ashx

11.2.2. Locations

- The Backup Generator Load Reduction method will now require the Backup Gen Fuel Type to be selected. If there is no value for Backup Load Reduction Method, then the Backup Gen Fuel Type must be ‘None’.
- The default Status on the Location Search screen will now be Active so that Inactive locations are not displayed.
- Change inactive status - Locations where all associated registrations are in a Terminated status may now have their Location Status changed to Inactive. The CSP may change the status to Inactive if they no longer expect to utilize the location to make administration of locations easier.
- Ability to edit EDC Account Number AND Address - Locations where all associated registrations are in a Withdrawn, New or Denied Status will allow...
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editing of the EDC Account Number and Address. This will allow a CSP to fix any errors with the EDC account number instead of creating a new EDC Account number.

11.2.3. Registrations
- The Meter Owner is now visible on the Location tab of the Registration. This allows the EDC to easily see if the meter is a CSP Meter or an EDC Meter during the registration review process.
- Aggregate Registrations - When adding a Location to a Registration, the popup window now supports filtering by Customer Name and EDC Account Number. This will make it easier to select multiple locations on a registration.
- Approved as Modified CSP Notification - When an EDC or LSE has permission and to modify a CSP registration during the review process, an email will be sent to the CSP indicating what was modified. Note – the Data History tab also contains records of all changes.

11.2.4. Settlements
- A flag has been added to the Settlement Search screen to indicate if the Settlement is an Adjustment.
- The Dispatch (kW) column now correctly displays the economic amount dispatched in Real-Time energy market

11.2.5. Events
- New columns have been added to the Event Search screen for Notify Time and Down Time. The Event Date has been renamed Start Date. The Date fields will now display both the Date and Time. This is intended to provide more clarification around events.

11.2.6. Compliance
- On the Compliance Search screen, the Start Time column has been renamed the Notify Time and a time has been added to the date. End Time also has a time component.

11.2.7. Meter Data
- A Header Row is now required for all meter uploads.

11.2.8. Reports
- A new report has been developed to display all Pending Tasks for Registrations and Settlements and who is responsible for the Task. This will help clarify for a CSP which task is waiting for review and which member needs to do such review.

11.3. Web Services

Document Number: D570932
11.3.1. An infrastructure change was made to streamline Web Service Requests. There were no changes to functionality, the WSDL, schemas or expected results.

11.3.2. Web Services will now restrict the number of days of data in the ‘Get’ transactions according to the following chart:

<table>
<thead>
<tr>
<th>Process</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get Process</td>
<td>100</td>
</tr>
<tr>
<td>Get Registration</td>
<td>730</td>
</tr>
<tr>
<td>Get Event</td>
<td>100</td>
</tr>
<tr>
<td>Get Dailydata</td>
<td>100</td>
</tr>
<tr>
<td>Get Intervaldata</td>
<td>100</td>
</tr>
<tr>
<td>Get Settlement</td>
<td>100</td>
</tr>
<tr>
<td>Get Compliance</td>
<td>100</td>
</tr>
</tbody>
</table>

11.3.3. Create Location – This is a corresponding change that has been made in the UI. The parameter for `<p:generationFuelType>` must now be specified as ‘None’, unless a `<p:reductionType>` of ‘Backup Gen’ is specified and then a fuel type must be chosen.

11.3.4. Web Services now returns more meaningful error messages when data is incorrect.

12. Release 12/13/2010

12.1. Infrastructure Upgrades

12.1.1. Infrastructure upgrades were performed to allow more effective implementation of future enhancements. The functionality of the eLRS User Interface has been modified slightly as outlined below.

12.2. User Interface

12.2.1. My Tasks Tab
- Additional filtering is now available making it easier to find records.
- The functionality to assign tasks to individuals has been removed.
- An Excel export button has been added to download the data on the My Tasks Search page. Used in conjunctions with the XML export, a complete record of the task and corresponding data can be obtained.

12.2.2. Meter Data Tab – a new tab has been created for Meter Data Management and Meter Data Summary. They were previously located under the Tools tab.

12.2.3. Events Tab - Event Details now has a ‘Related Events’ button to return to the search page and show related events for the same registration.

12.3. Web Services

12.3.1. No changes

13. Release 08/18/2010

13.1. User Interface

13.1.1. Email Enhancements

Document Number: D570932
• For performance improvements, the following emails will no longer be sent. **Please note this does not affect Emergency Event Notification (Declared or Ended) emails.**

  - Emails when Emergency Energy Event is Confirmed by PJM. PJM does a final confirmation of emergency energy start and end times based on internal logs to ensure the time in eLRS reflect the official event times.
  - Emails when an Emergency Energy Event Settlement is created and ready to be submitted by CSP.
  - Reminder Emails when an Incomplete Emergency Energy Event Settlement reaches 50 calendar days after the Emergency Event Date. Note the settlements must be submitted within 60 days.

13.1.2. Addbacks

  - PJM will upload any Add Back information for each Emergency Registration based on economic and emergency events.
  - CSPs, EDCs and LSEs can retrieve the Add Back information by one of the following methods:
    - Go to the Tools tab, select Meter Data Summary. Choose Add Back for Type and Select a Date Range. You may filter by any of the fields with a yellow box below it. To see the Add Back data, click the Export as XML icon in the top right corner. Note that registrations with no information will show 0 days and 0 kwh – the xml file will only download location where add backs are present.
    - Go to the Tools tab, select Meter Data Management. Fill in the Registration ID, select the EDC Account Number. Select Meter Data Type for Interval Reading and Select a Date Range, then click Generate Report. You must then filter the spreadsheet by the Type column for Add Back. Please note this will download all interval data (Capacity Compliance, SR Compliance and Add Backs) for the registration and location for the date range – you may also retrieve prior versions of the information through this UI if multiple versions have been loaded.

13.2. Web Services

13.2.1. Get Registration and Get Settlement

  - Get Registration and Get Settlement Web Service requests have been updated to allow the following. Note: There is no change to the WSDL. This means you
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can now request only pending Settlements for a specific date range for a specific zone.

- Option = Status, allows filtering by status.
- Zone = Zone Name, allows filtering by settlement zone

14. Release 05/06/2010
14.1. User Interface
14.1.1. RERRA Evidence

- References to RERRA Evidence are now available within the eLRS application. To access, click the Tools tab, then select RERRA Evidence.
- Each EDC may select default RERRA Evidence by state(s). Selecting a default will automatically add the RERRA Evidence to any new registrations with a location in that state. To access the default selections, click the Tools tab, then select Org and User Management, then select the EDC and click on the RERRA Evidence tab.
- Registrations being confirmed by a ‘Small’ EDC are now required to have a RERRA Evidence reference populated on the RERRA Evidence tab before the registration can be approved. If there is no RERRA Evidence reference on the registration withing 10 business days, the registration will Auto-Deny instead of Auto-Approve.
- Registrations being denied by a ‘Large’ EDC for the new Denial Reason ‘RERRA Evidence’ must have a RERRA Evidence reference populated on the RERRA Evidence tab before the registration can be denied.

14.1.2. Economic registration extensions can now be requested with a new Terminate Date of a maximum of 400 days from the current Terminate Date.
14.1.3. Account Number Formats can now be restricted so that the minimum number of characters equals the maximum number of characters.

14.2. Web Services
14.2.2. Support for Economic registration extensions can now be requested with a new Terminate Date of a maximum of 400 days from the current Terminate Date using the transaction type of Change Registration Terminate Date. See Section 4.15 of the Web Services User Guide for details http://www.pjm.com/markets-and-operations/etools/~/media/etools/elrs/elrs-web-services-guide.ashx.

15. Release 03/29/2010
15.1. User Interface
15.1.1. DR Capacity Only – a new Program has been added for DR Capacity Only.

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15.1.2. Termination of Emergency Registrations – CSPs can now terminate Emergency registrations, as necessary, any time before the Effective Date of the registration instead of contacting PJM to terminate.

15.1.3. Opt In/Opt Out Enhancements
- The Small/Large EDC designation is now visible on the registration screen next to the EDC name.
- When a registration is created with a Small EDC, a new task is generated for PJM to review/approve the RERRA Evidence supplied by the EDC in the Comment section.

15.1.4. Copying or Extending Registrations – Data from the location is now refreshed with a registration is copied or the termination date of the registration is changed to a date after the current termination date. If the CSP updates location information it will be used on the next registration.

16.1. User Interface
16.1.1. Process History Performance Improvements – When the Process Name is clicked, the details below open in a timely fashion.
16.1.2. Support for DR Registrations
- The RPM DR Resource is no longer a required field when a DR registration is submitted. It can be updated by the CSP until the registration deadline date.
- Two new RPM reports have been added for CSPs: Resources Linked to Registrations displays all RPM DR Resources and which registrations they have been linked to; Orphan DR Registrations display DR registrations for which no RPM DR Resource has been linked. Both of these reports can be downloaded to an Excel spreadsheet.
16.1.3. ID Numbers are now displayed on the Search pages
16.1.4. Alert E-mail Performance Improvements – There is no longer a delay when real-time dispatch e-mails are sent out.
16.1.5. Synchronized Reserve Meter Compliance Data File - A false duplicate message is no longer given because of Excel formatting issues.
16.1.6. Copying Emergency Registrations – Economic registrations can now be created by copying an emergency registration and select Economic as the program type.

16.2. Web Services
16.2.1. Support for DR Registrations – The RPM DR Resource can be updated using the RPM DR Resource value instead of the internal OID number.

17.1. User Interface
17.1.1. My Tasks – the default Task Status when a user logs into eLRS is now ‘Available’.

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18. Release 10/26/09

18.1. User Interface

18.1.1. Meter Data Download (Tools|Meter Data Summary) - New Feature added to allow users to quickly see summary of meter data (Days submitted, total kwh, max kwh, last event and last reading) submitted over a specific time period for specific registrations and EDC account number. User can also download all meter data based on the filter results to xml file.

18.1.2. Registration Copyback to Location – New Feature added to copy data modified on the registration back to the location. Fields include Peak Load Contribution, Retail Rate, Contract Type, Rate Name, Rate Description, Energy Loss Factor and Capacity Loss Factor.

18.1.3. Support for Daylight Savings Time - the meter data upload will now require 25 hours for the long day (11/1/2009).

18.1.4. Search Functionality – additional capability to sort registrations, settlements and compliance by Registration ID, in Location by Location Name.

18.1.5. Support for EDC/State, EDC/Zone, Zone/Pnoded and Zone/Pricing Point relationships – enforced at the location and registration level when they are created or updated.

18.1.6. Performance enhancements to the Process History tab

18.1.7. Ability to add comments to a registration or settlement during approval of task

18.1.8. Bus Pnode enhancement – EDCs can now select a Bus Pnode on a location by using a dropdown and selecting the Bus Pnode name instead of typing the data into the field.

18.1.9. Email Content – enhancement to display the short name of the CSP, EDC and LSE on the registration or settlement.

18.1.10. Manage Settlement Role – enhancement to allow this role to Read Registrations in addition to the current permissions.

18.2. Webservices

18.2.1. User Interface: Download the meter data for the entire date range for all the registration shown in the page as an xml, via a meter data download screen.

18.2.2. XML Transaction request id is returned in the xml response.

18.2.3. XML returns Process IDs for registrations and settlements.

18.2.4. All completed and pending registration and settlement processes for a specific organization, are returned as part of the result, once an optional parameter is added to the process request.

18.2.5. Several optional parameters were added to registrations and settlements xml. Details of the optional new parameters are specified in the eLRS Web Services guide posted at: http://www.pjm.com/markets-and-operations/etools/elrs.aspx

Please note, none of the XML changes require schema changes at this time. Few future enhancements that PJM is working on, will require schema changes. PJM will make every reasonable effort to give stakeholders’ early notifications of any upcoming changes.

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