PJM OASIS User Guide

Revision 10

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I. Introduction

The PJM Open Access Same-time Information System, or OASIS, provides both public and restricted access to Transmission Service and other information in accordance with the Federal Energy Regulatory Commission's (FERC) landmark orders 888, 889 and 890. This user guide provides Transmission Service Customers with the information needed to both utilize the OASIS Application and perform tasks related to the procurement of Transmission Service.

A. Is this user guide for you?

This *PJM OASIS User Guide* is for Transmission Service Customers who need to use the *OASIS Application* through a **web browser** to view, buy, resell, or annul Transmission Service.

B. Definitions

Capitalized terms shall have the meanings defined in the *PJM Regional Transmission and Energy Scheduling Practices*.

This guide distinguishes between the OASIS web site and the OASIS Application.

- ***OASIS*** refers to the application that requires users to register and log-in to the PJM Tools, whether accessed through a web browser or templates.
- ***OASIS Node*** refers to publically available content on http://oasis.pjm.com, which does not require log-in.
- ***Regional Practices*** shall mean PJM's Regional Transmission and Energy Scheduling Practices.
- ***TSR*** shall mean *Transmission Service request* and/or *Transmission Service reservation* as applicable.

C. Prerequisite knowledge

The *PJM OASIS User Guide* is written under the assumption that you are familiar with:

- **Cross-border Transmission Service concepts** including Available Transfer Capability, cross-path impacts/decrementing, firm and non-firm, point-to-point and network service.
- **PJM** Transmission Service, interchange and curtailment concepts.
  - **PJM Regional Transmission and Energy Scheduling Practices**
  - **PJM Merchant Transmission Practices** for each Merchant Transmission facility on which you plan to do business.

1) PJM's Manuals (pjm.com/library/manuals)
2) Regulatory Information
   - NERC Reliability Standards as relates to interchange (www.nerc.com)
   - North American Energy Standards Board (NAESB) WEQ Business Practice Standards applicable to Transmission Service including WEQ-001, WEQ-002, WEQ-003 and WEQ-013 (naesb.org/weq)
   - FERC Order 888, 889 and 890 concepts including the pro-forma Open Access Transmission Tariff (OATT), firm and non-firm, point-to-point and network, pre-confirmed, and service across multiple transmission systems (www.ferc.gov)

D. Application Interfaces

Transmission Service Customers have two primary methods of interacting with PJM OASIS: web browser or the Application Programming Interface (API).

Web Browser

PJM authored this **user guide** to educate end-users on the utilization of the interactive, web-based OASIS pages.

You can navigate to the PJM OASIS by following this link: oasis.pjm.com

API

Your company may elect to build software to interface directly with the OASIS API. OASIS functionality is accessible via PJM's Command Line Interface (CLI) and through industry-standard NAESB WEQ-002 Templates.

PJM API documentation

PJM publishes two documents to assist market participants with the creation and testing of custom software utilizing the API.

Command Line Interface:

PJM Command Line Interface

OASIS API User Guide:

OASIS API User Guide

NAESB API and business practice standards

NAESB publishes the FERC-mandated, industry-standard API for OASIS access. The WEQ-002 Open Access Same-Time Information Systems (OASIS) Business Practice Standards and Communication Protocol (S&CP) document is available on the NAESB website (naesb.org). NAESB Business Practice Standards are protected under copyright and cannot be distributed directly by PJM.

II. PJM OASIS Website

A. Overview

The *OASIS* provides information about Available Transfer Capability (ATC) for point-to-point and network Transmission Service and a process for requesting Transmission Service on a non-discriminatory basis. The OASIS enables Transmission Providers and Transmission Customers to buy and sell available transmission capability offered under the *Open Access Transmission Tariff*.

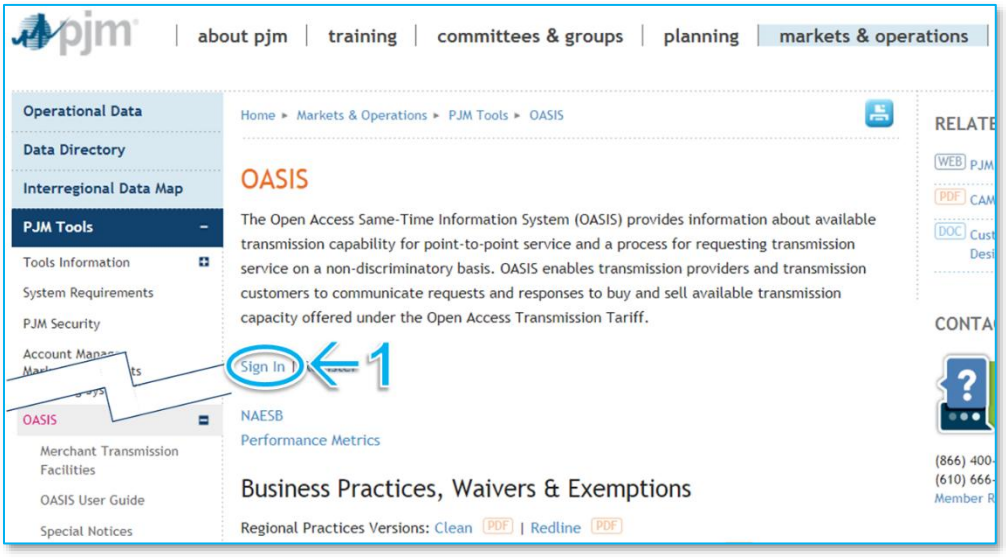
The OASIS is comprised of the publicly accessible *OASIS Website* and the secured *OASIS Application*. The scope of this User Guide is limited to the OASIS Application. The OASIS Application contains both public and confidential data. Any user affiliated with an entity present in the NAESB Electric Industry Registry (EIR) may request read-only access to the OASIS Application.

III. Introduction to the PJM OASIS Application

This chapter is for end-users who will access the OASIS Application through a web browser.

A. Accessing the PJM OASIS Application

From the OASIS homepage, click "Sign In" or "Register".



Or, from the Tools Sign In page, click "Sign in"

B. OASIS Application Privileges

To access the OASIS Application, you must have a valid PJM Tools user account with OASIS privileges. OASIS privileges include the following:

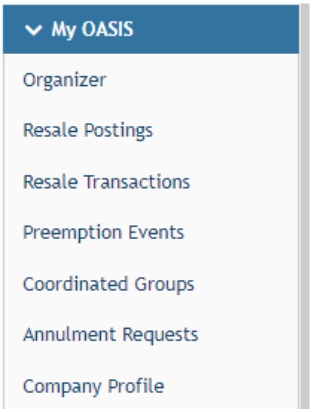
- **Read Only** – view all data in the OASIS Application and post OASIS messages.
- **Read/Write** – view and submit Transmission Service transactions; products available are limited to those for which your company has executed the appropriate service agreements.

Read Only access is automatically approved for all users upon request. Your individual company's Account Manager can grant you the remaining **Read/Write** privilege. For instructions, see the Account Manager User Guides.

C. Navigation Pane

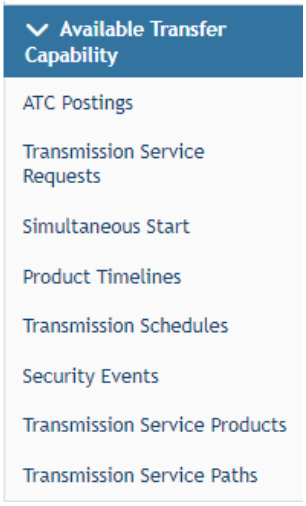
You can access the varying OASIS Application pages in the navigation pane on the left side of the page.





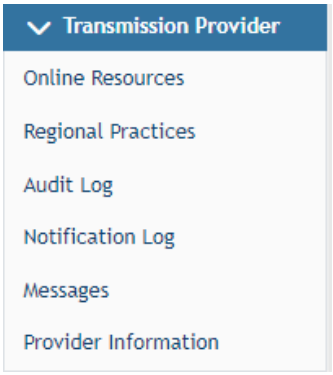
My OASIS
Central location to find transactions pertinent to your company.

- **Organizer**. View of your company's transactions. You can request service and take actions on existing transactions directly from the organizer.
- **Resale Postings**. View and edit your company's postings to resell service.
- **Resale Transactions.** View the transactions related to reselling service.
- **Preemption Events.** View events related to your company's role as a Challenger or Defender in the preemption process.
- **Coordinated Groups**. View and edit your company's coordinated groups of transactions.
- **Annulment Requests**. View and submit requests to annul your company's reservations.
- **Company Profile**.
    - Request NAESB EIR Mapping button. Request for OASIS Admins to map your PJM account to your registered code.
    - Company Information. View your company's information. This information is pulled from the NAESB EIR.
    - Contacts. View your company's primary contacts.
    - User Settings. View and update your user settings.
    - Company Settings. View and update your company settings. These settings apply to every user in the company.
    - Service Agreements. View a list of the products that your company is permitted to utilize, grouped by service agreement.



Available Transfer Capability

- **ATC Postings**. Search for and view ATC postings. You may request service directly from a posting.
- **Transmission Service Requests**. Search for and create Transmission Service requests across all PJM Transmission Service Customers.
- **Simultaneous Start**. View the results of PJM's simultaneous start evaluation.
- **Product Timelines**. View the offer and response timings associated with available Transmission Service products.
- **Transmission Schedules**. Search for scheduled use of Transmission Service.
- **Security Events**. View security events that may impact ATC.
- **Transmission Service Products**. View a list of the Transmission Service products available from PJM.
- **Transmission Service Paths**. View a list of the Transmission Service paths for which PJM makes Transmission Service available.



Transmission Provider
Information specific to PJM's role as a Transmission Service Provider.

- **Online Resources**. Documents available online such as the PJM Open Access Transmission Tariff.
- **Regional Practices**. PJM's Regional Transmission and Energy Scheduling Practices contain the business rules pertaining to Transmission Service and interchange scheduling.
- **Audit Log**. A log of all OASIS activity.
- **Notification Log**. A log of all notifications sent by the OASIS.
- **Messages**. A tabular view of messages posted on the OASIS, including messages from PJM and other OASIS users.
- **Provider Information**. PJM's company and contact information.



Templates
PJM-supported templates. Templates can be executed directly in the OASIS Application, executed using the PJM CLI, or implemented according to NAESB WEQ-002.

- **Template Builder**. Build and validate templates directly in the user interface. Create CLI or URL for submission.
- **Template Catalog**. A list of all NAESB WEQ-defined templates and PJM custom templates.
- **Data Dictionary**. Definitions of all valid data elements that may be used in templates.

D. Common features across OASIS pages

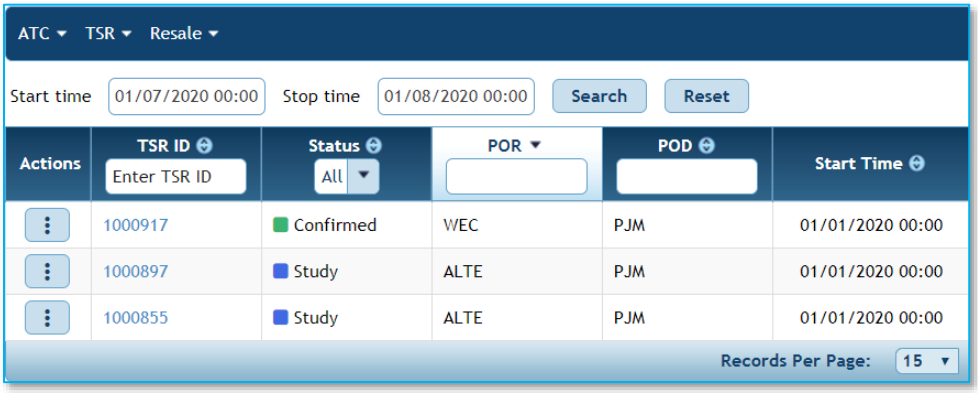
Menus: page-specific menus such as the Resale menu on the Organizer page.



*Required Fields**

A red asterisk (*) on a page indicates a required field.

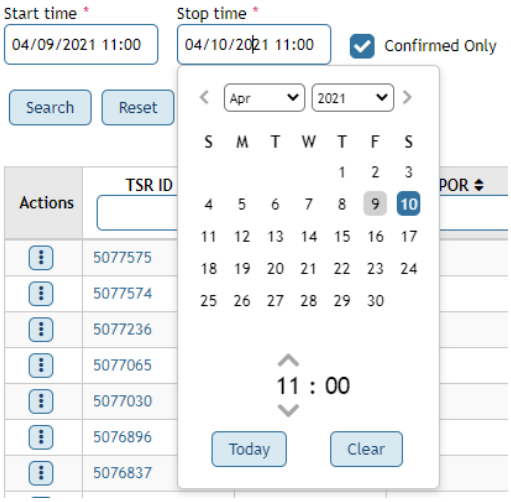
Tabular data



Many pages provide data in a tabular format. Common functions include the following:

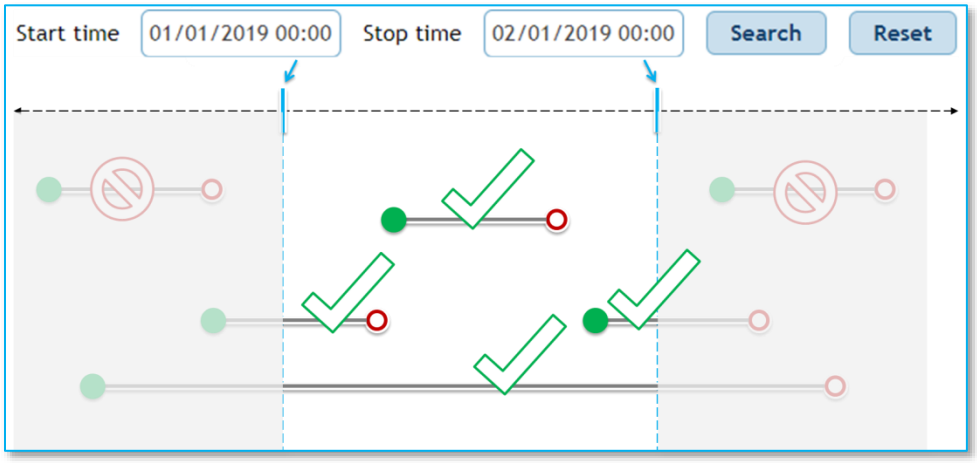
Search Criteria

Search criteria appear, if applicable, above the table. Enter your Search Criteria, and then click the Search button to retrieve data. You can further refine your data without searching again. Just enter filter criteria in the table's column headers (where available).

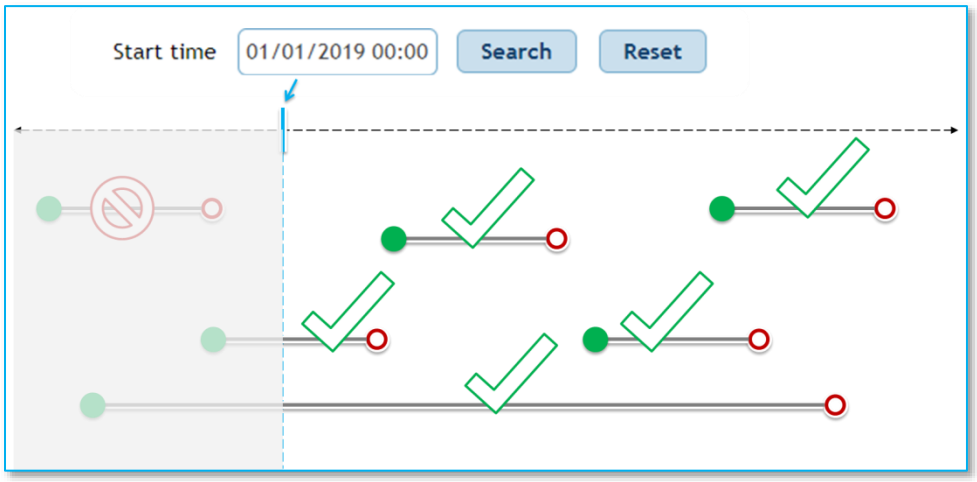


Date Criteria

If both Start and Stop time search criteria are provided, the search will include all transactions that overlap the start/stop period (image below).



If only a Start time is provided in the search criteria, the search will include all transactions with an end time on or after the Search Start time (image below).



Column Filter and Sort

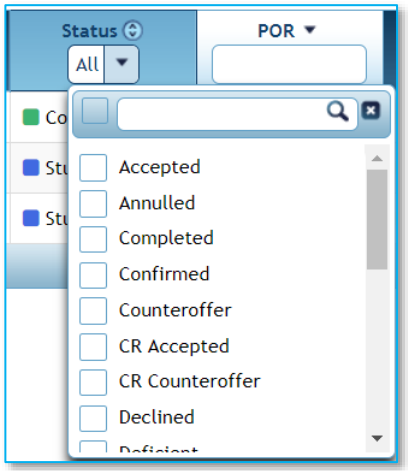
After using Search Criteria to retrieve data, you can further refine your data without searching again. Just enter filter criteria in the table's column headers (where available).

Column headers include either a smart drop-down box, a calendar widget or a text box as appropriate.

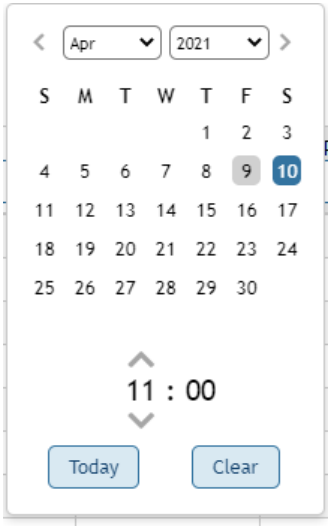
Sort any column by clicking on the column header.

Widgets

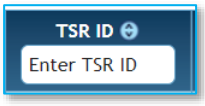
Multi-Select drop-down



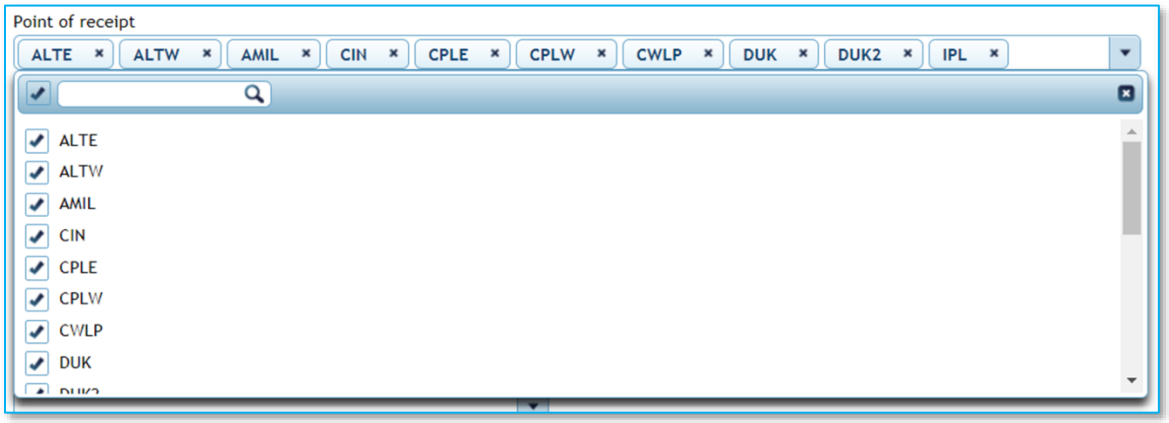
Calendar widget



Text box



Multi-Select drop-down boxes

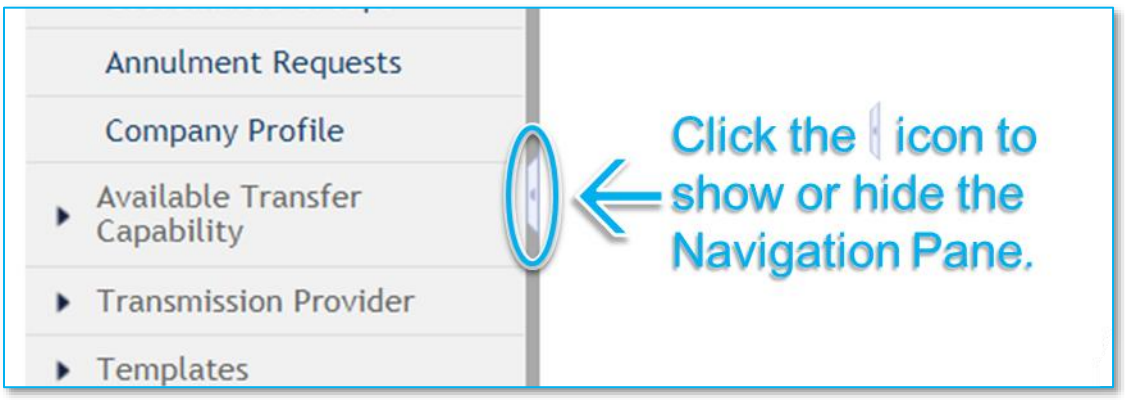


1. Click to open
2. Start typing in the search box to filter the list.
3. Click the box to the left of the search box to select or deselect all items.
4. Click on individual items to select or deselect them.
5. If you select a large number of items, they may not all page in the collapsed Smart drop-down box.

Action Menu 

The context-sensitive Action Menu appears in the leftmost column of tabular data and may be used to perform actions on a specific record (row). Read more under the Action Menu section.

Collapse/expand Navigation Pane



Save and Export

Save as default query, to set a default query that will populate each time you load the page.

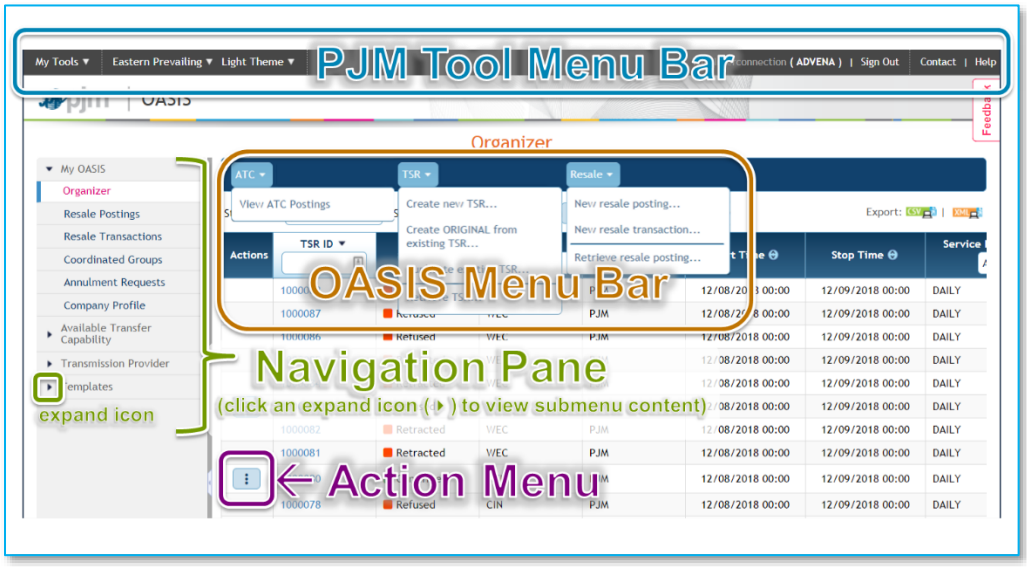
Remove default to return to default “clean screen” status each time you load the page.

Export in CSV format 

Export XML format 

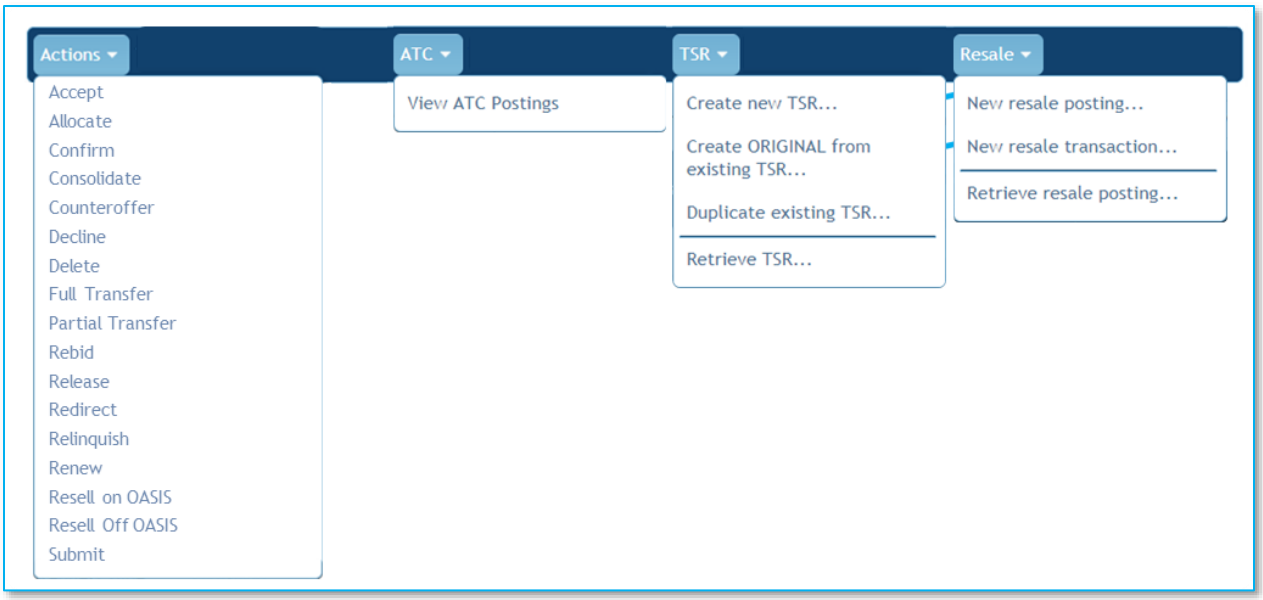
IV. Menu Bar

The *PJM Tool Menu Bar* is topmost in the browser window. The ***Navigation Pane*** appears on the left-hand side of the page. The ***OASIS Menu Bar*** sits atop the OASIS page. The ***Action Menu*** appears in the left-most column of tabular data and the menu bar atop the page.

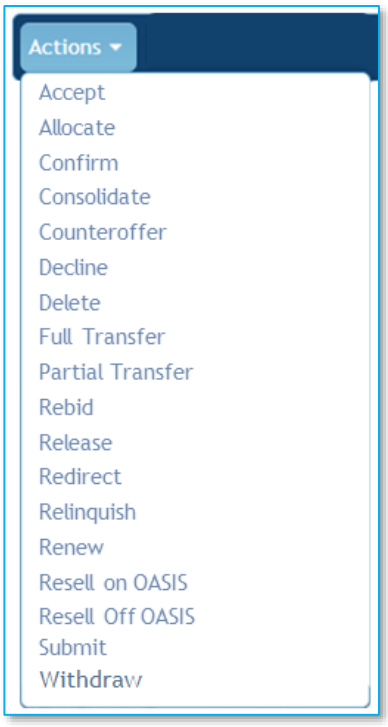


The OASIS Application contains the

- *Action Menu* ⋮, where actions are available, in the left-most column of tabular data (see image above) *and*
- ATC, TSR, and Resale menus, where applicable, in the *OASIS Menu Bar* (see image above and image below).



A. Action Menu (and Actions Icon)



You will find the **context-sensitive** *Action Menu* in the *Menu Bar* when viewing an individual transaction.

In tabular data, you will find the *Actions Icon* ⋮ in the leftmost column.

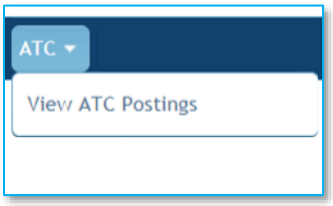
In either case, you will find only those actions you may perform on that specific row or transaction. Click the *Action Menu* or *Actions Icon* to see actions available on that record.

View a description of each action…

Action	Description
Accept	Accept an offer for service, changing the status to ACCEPTED.
Allocate	For Merchant Facility Owners to assign facility rights to the Primary Rights Holders
Confirm	Confirm a request for service that was not preconfirmed, changing the status to CONFIRMED.
Consolidate	Consolidate multiple TSRs under an umbrella TSR ID.
Counteroffer	Submit a counteroffer to the terms of a resale consistent with NAESB-WEQ-001.
Decline	Seller of service declines negotiated price or other terms of a Redirect, Resale or Transfer.
Delete	Delete a saved but not submitted posting or request for service.

Action	Description
Full Transfer	Begin to transfer the full amount of a confirmed TSR between customers.
Partial transfer	Transfer a portion of a confirmed TSR between customers.
Rebid	Respond to a resale posting with proposed revised price.
Release	Primary Rights Holder voluntary release of Merchant Facility Service.
Redirect	Request to change the POR, POD, Source and/or Sink of a TSR.
Relinquish	Ask PJM to release unscheduled capacity from a confirmed *Redirect* back to the TSR from which it was redirected.
Renew	Request to exercise rollover-rights of a long-term firm TSR.
Resell off OASIS	Enter a resale transaction that you negotiated outside of the OASIS.
Resell on OASIS	Create a posting to negotiate the sale of confirmed service on the OASIS.
Submit	Submit your request for evaluation.
Withdraw	Withdraw a request before it reaches confirmed status

B. ATC Menu



The *ATC menu* is located on the Organizer page. It contains a single menu item, *View ATC Postings*, which navigates to the ATC Postings page. The *ATC Postings* page is a convenient place to identify availability of short-term Transmission Service by path, product and timeframe.

C. TSR Menu



Menu Item	Description
Create new TSR…	Navigates to *New Transmission Service Requests* (see section 4.4.5)
Create ORIGINAL from existing TSR…	Allow the user to create a new request for service as a copy of an existing TSR; additionally sets the request type to ORIGINAL.
Duplicate existing TSR…	Allows the user to create a new request for service as a copy of an existing TSR.
Retrieve TSR…	Allows a user to view the details of an existing TSR.

Create new TSR…

Launches the *New Transmission Service Request* dialog for the entry of a request for Transmission Service.

Duplicate existing TSR… and Create ORIGINAL from existing TSR…

Both *Duplicate existing TSR…* and *Create ORIGINAL from existing TSR…* menu items allow the user to use a copy of an existing TSR as a template for a new request. The difference is that *Create ORIGINAL from existing TSR…* sets the request type of the new TSR to ORIGINAL. You can use this option to save time while duplicating a TSR with a request type other than

ORIGINAL, like REDIRECT or RESALE. See *NAESB WEQ-001* standards to learn more about request types.

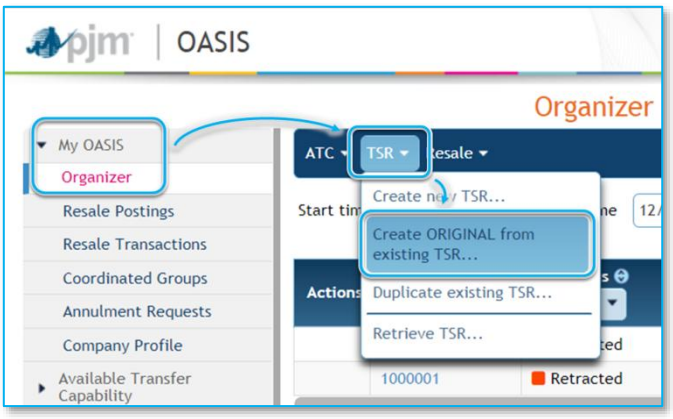
Selecting either menu item will launch a TSR search window that will allow you to find the TSR you wish to copy.

Quick Steps

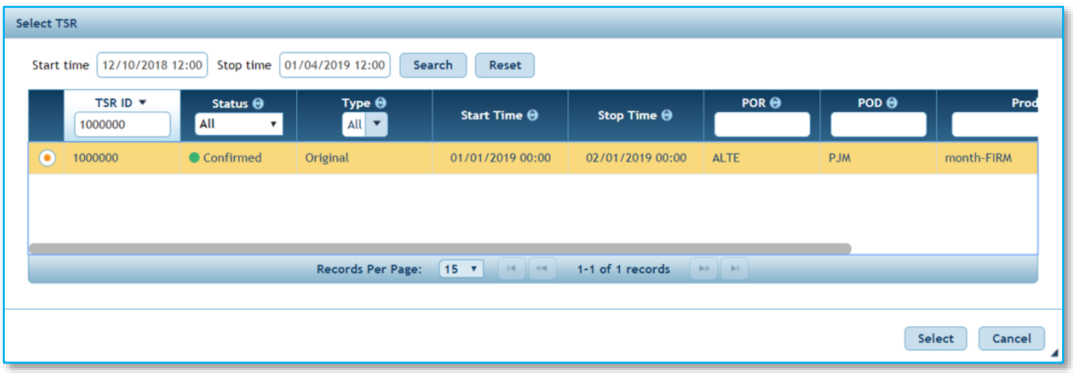
1. *OASIS*: *My OASIS* > *Organizer* > *TSR Menu* > *Create ORIGINAL from existing TSR…*
2. *Select TSR* dialog: Search for TSR > select TSR > *Select* button
3. *New Transmission Service Request* page: Edit as needed and Save or Submit.

Detailed Steps

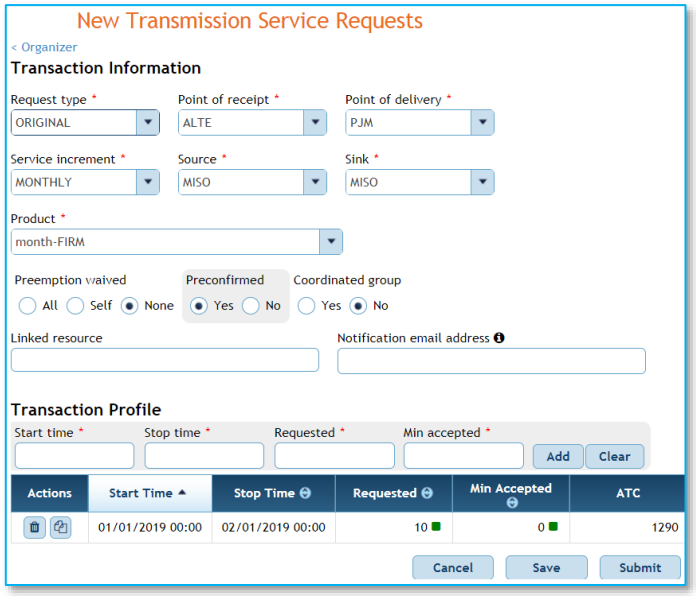
1 OASIS: My OASIS > Organizer* > TSR Menu > Create ORIGINAL from existing TSR…



2 Select TSR dialog: Search for TSR > select TSR > Select button



3 New Transmission Service Requests page: Edit as needed and Save (to determine next steps later) or Submit.



D. Resale Menu

The *Resale* menu facilitates resale of service, which can be initiated by the buyer or seller, though through different menu selections as described herein.



New resale posting…	Seller only: Enter a “want ad” to resell Transmission Service.
New resale transaction…	Buyer only: Enter a resale transaction.
Retrieve resale posting…	View an existing resale posting (want ad) by posting ID.

You will find the *Resale* menu on the *Transaction Information* dialog, which opens when you click on a *TSR ID* from any screen. The *Resale* menu is also located on the following pages.

- *Organizer*
- *Resale Postings*
- *Resale Transactions*
- *Transmission Service Request*

New resale posting…

This menu item launches the New Resale Posting page.

Quick Steps

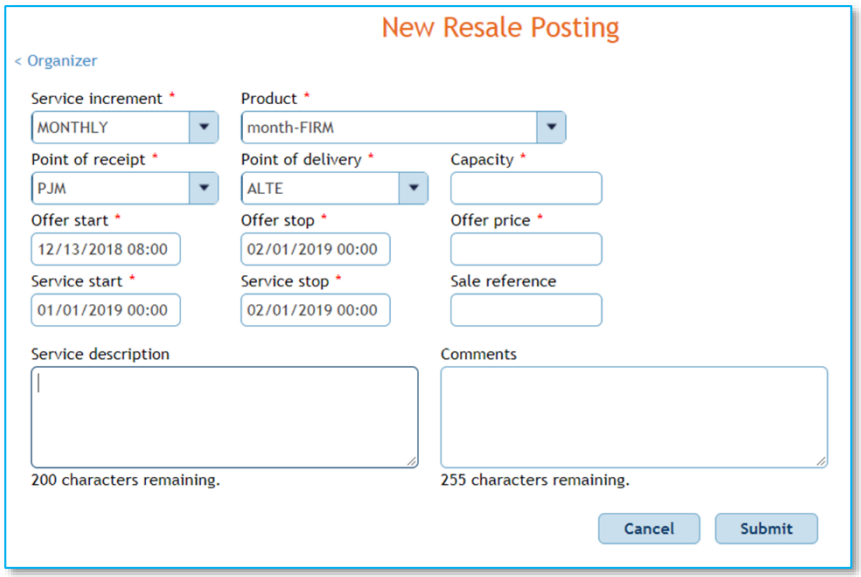
1. *OASIS*: *My OASIS* > *Organizer* > *Resale* menu > *New resale posting…*
2. *New Resale Posting* page: enter Transmission Service posting details and click Submit.

Detailed Steps

1. *OASIS: My OASIS* > *Organizer** > *Resale* menu > *New resale posting…*



2. *New Resale Posting* page: enter Transmission Service posting details and click Submit.



New resale transaction…

From the *Organizer*, find the TSR(s) you are reselling. Note the TSR number(s) which will be used in the steps below.

1. Option 1: *My OASIS* > *Organizer** > *Resale menu* > *New resale transaction…*
Option 2: *My OASIS* > *Organizer** > click on TSR ID to enter the *Transaction Information* dialog.



2. New Resale Transaction page:

Determine from which TSR, or TSRs, you will resell capacity. Enter the first *TSR ID* in the *TSR ID* field. Enter start and stop times to represent the time range from which capacity is being sold, then select Match to identify TSRs that fit within this time range.



Retrieve resale posting…

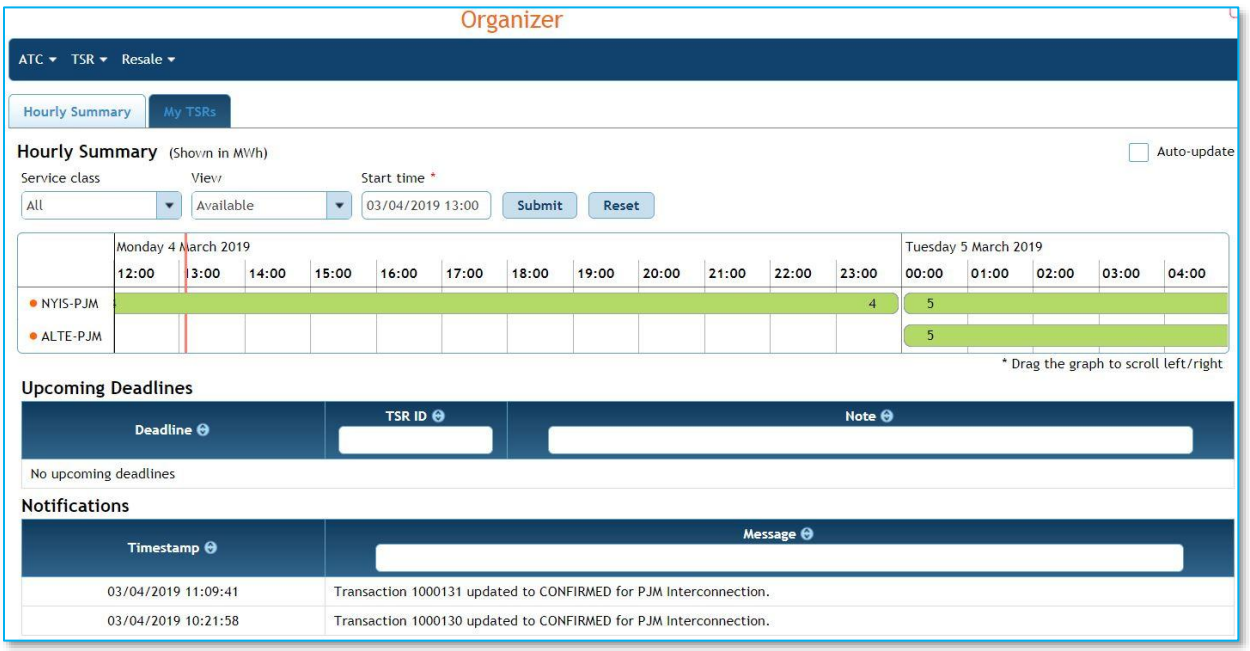
You can quickly jump to a specific posting of service for resale by entering the *Posting ID* on the *Retrieve Posting* dialog.



V. My OASIS

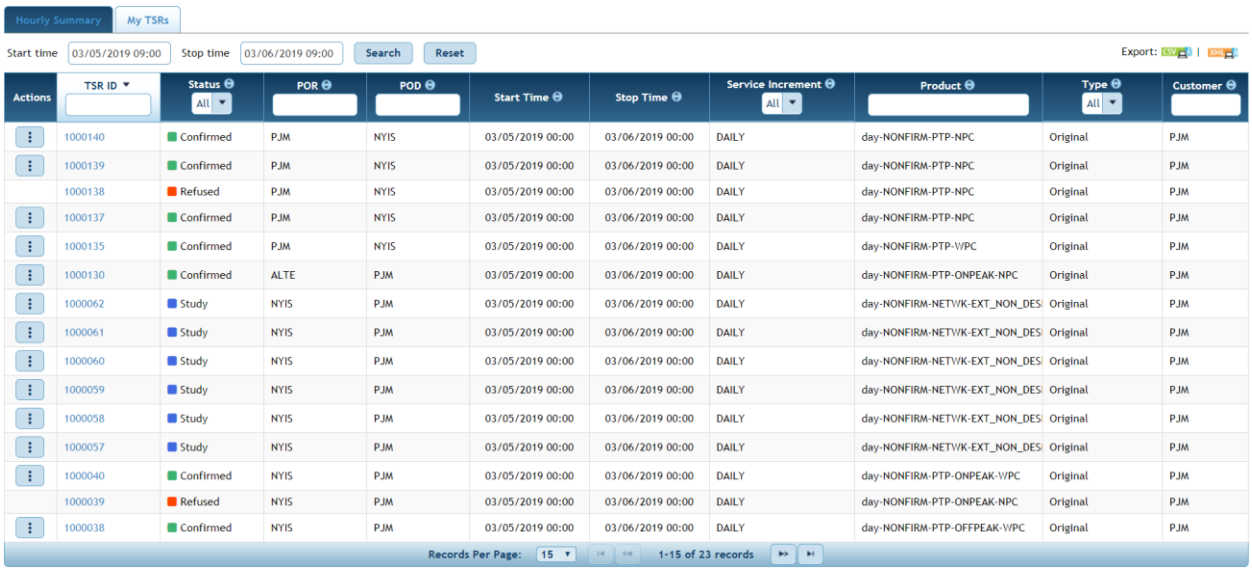
The *My OASIS* section of the OASIS Application is available through your web browser and encompasses tasks specific to your company.

A. Organizer



The Organizer provides a summary view of your organization's TSRs. From the Organizer, you can view, resell, and purchase service. The Organizer has two views: one with an hourly timeline, and another with a tabular view of your company's Transmission Service requests and reservations.

The Organizer *Hourly Summary* provides a timeline of your Transmission Service as it relates to the paths that you have service on. This page also provides a list of upcoming deadlines for your TSRs that require a customer action, and it shows notifications from PJM. A specific TSR ID can be searched by typing in the ID, or the first few numbers of the ID, of the TSR(s) you are interested in and pressing Enter on your keyboard.



The Organizer *My TSRs* displays a tabular view of all of your company's TSRs that overlap the entered Start time and Stop time. The default Start time is last hour and the default Stop time is 24 hours after the Start time.

Instructions for My TSRs

1) Enter *Start Time* and *Stop Time*. All reservations that overlap the start to stop window will be displayed.
2) Click Search.
3) Click Reset to restore default search criteria for this page.

Menu Bar on the Organizer

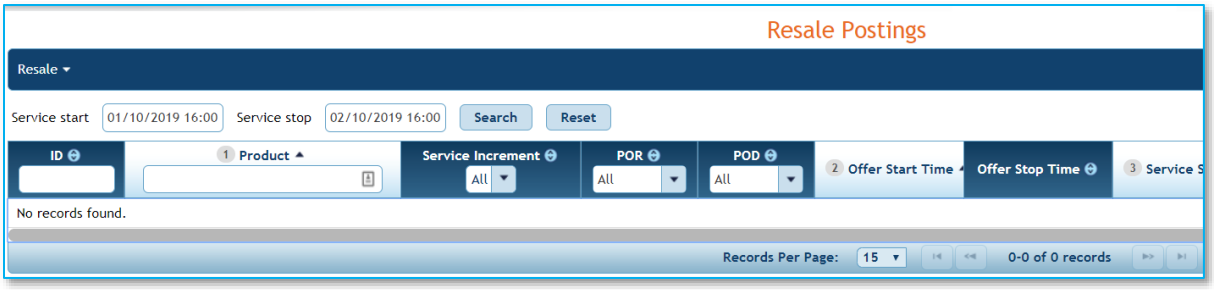
The following menus are available on the Organizer.



Actions Icon on the Organizer

Click the context-sensitive *Actions Icon* to see what actions can be performed on a given record (row).

B. Resale Postings



The Resale Postings page provides a single location to view your company's postings (offers) to resell Transmission Service.

Instructions

This interface displays your company's postings to sell Transmission Service that overlap the entered *Service start* and *Service stop* fields. The default service start and stop are the beginning of the current hour until one month in the future.

View your postings to sell service for a specified time

1) Enter the *Service start* and *Service stop* times for which you would like to query resale postings.
2) Click Search.

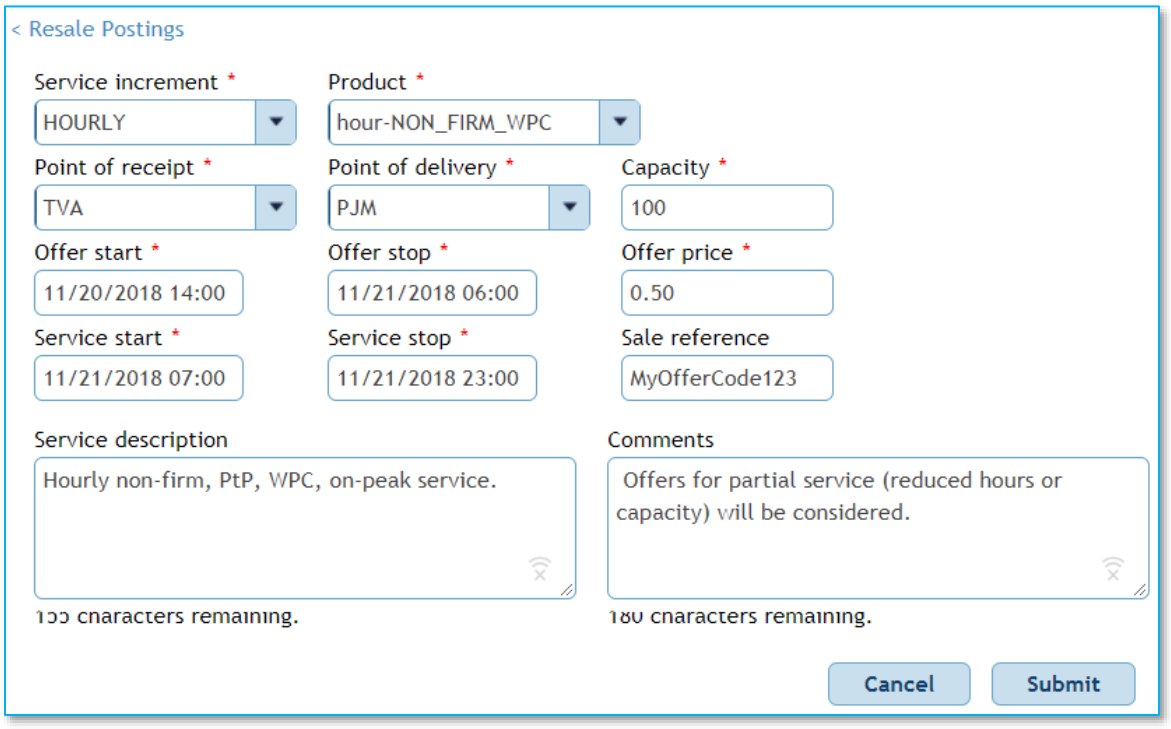
   To view other companies' postings, navigate to *Available Transfer Capability* > ATC Postings.

Create a posting to sell service

1) From the *Resale Menu*, select New resale posting…



2) Complete the *New resale posting…* form.



3) Click Submit.

Enter a resale from your company to another party.

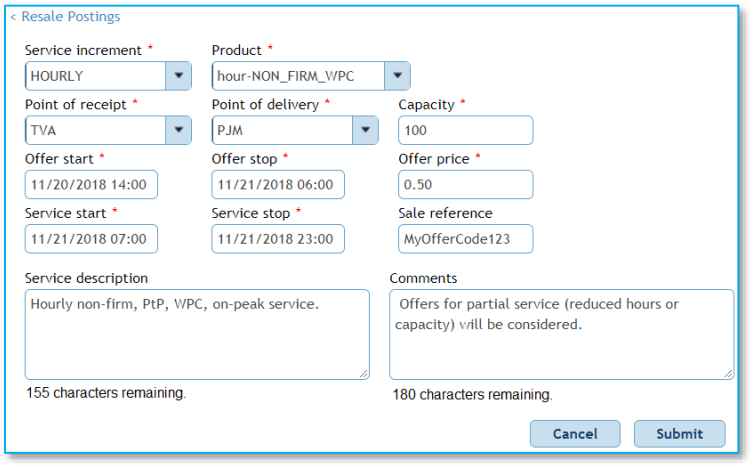
1) From the Resale menu, select *New resale transaction…*



2) Enter the ID of a confirmed TSR owned by your company. Enter the *Service start* and *Service stop* times for which you would like to create a resale posting. Click Build Profile.



3) Complete and submit the *New Resale Transaction* form.

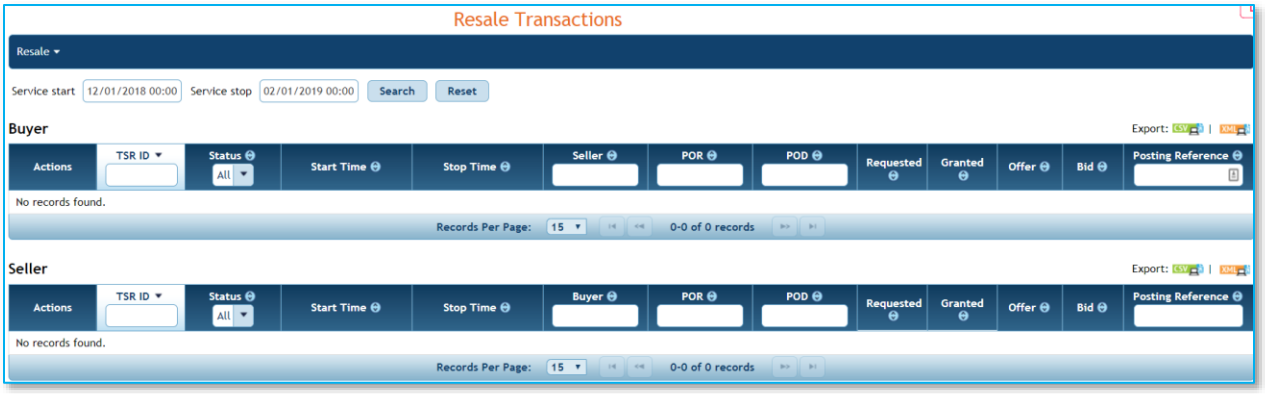


a) Fields with a red asterisk (*) are required.

b) Click Match.

4) Continue to the Resale Transactions page, which is described in the next section.

C. Resale Transactions



The Resale Transactions page provides a single location to view your company's purchases and sale of Transmission Service.

Click Search to view transactions that meet the search criteria (the Start time and Stop time), regardless of status.

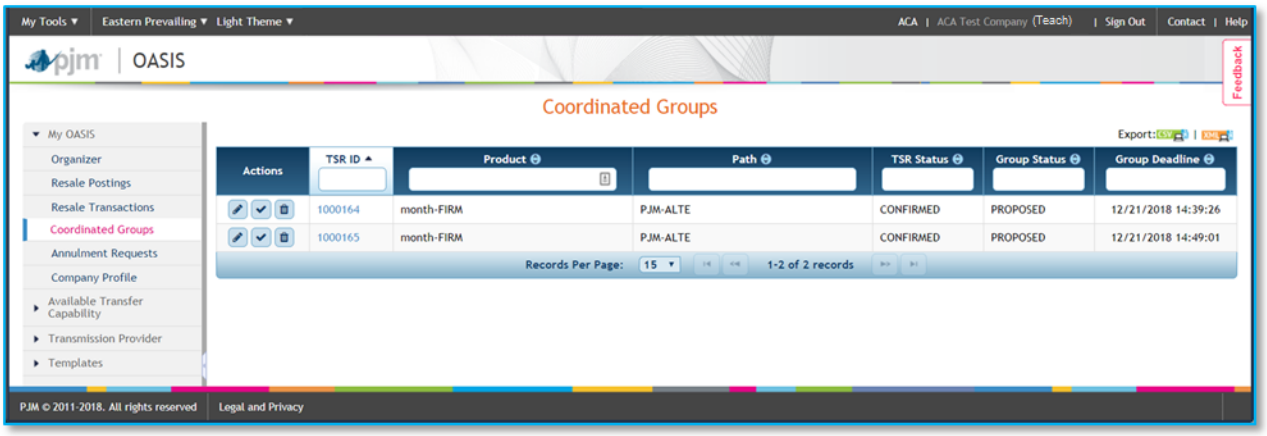
The Buyer section includes transactions where your company is the Buyer.

The Seller section includes transactions where your company is the Seller.

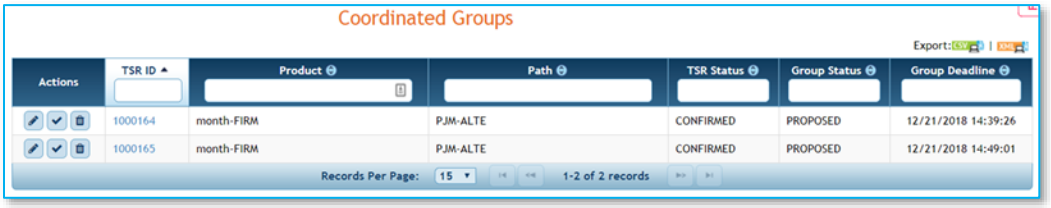
Columns: Action, TSR ID, Status, Start Time, Stop Time, Seller, POR, POD, Requested, Granted, Offer, Bid, and Posting Reference.

You can take actions on transactions here just as you would any other tabular data, such as the Organizer.

D. Coordinated Groups

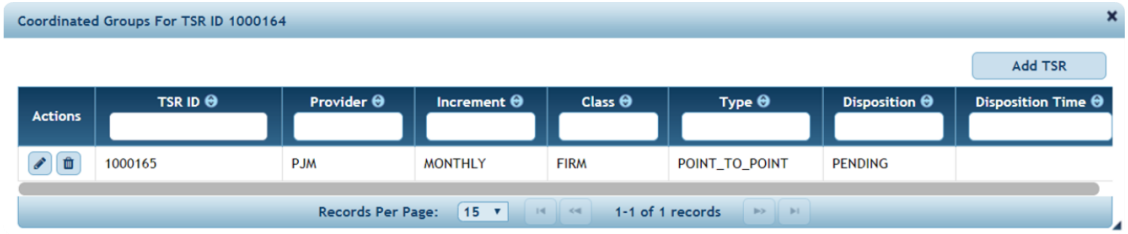


Service Across Multiple Transmission Systems (SAMTS) describes an option that enables customers to coordinate requests for service on multiple Transmission Service Providers' systems. Each affected provider will continue to independently evaluate the requests submitted on their OASIS. If the customer enters the status and details required by the standard for each request and one or more transmission service providers refuse all or part of a Coordinated Request, the customer is able to reduce or request annulment for the other Coordinated Requests on other OASIS nodes. See section 1.22 of the *Regional Practices* for additional information.



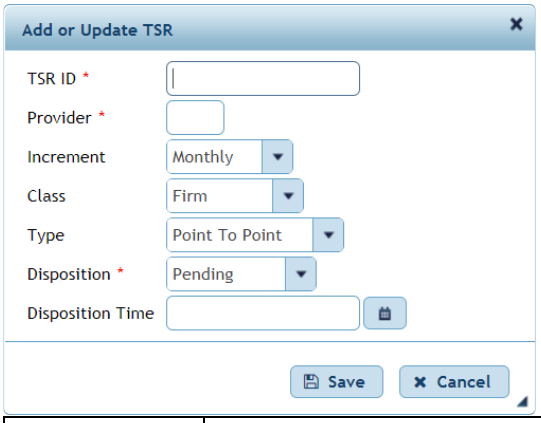
Actions

Open the *Coordinated Groups For TSR* dialog.



Actions

Add TSR



TSR ID	The Assignment Reference of the TSR to add to the Coordinated Group. The unique Assignment Reference Number of the Coordinated Request (i.e., this TSR) as it appears on the Primary Provider's OASIS node. If PJM is the Primary Provider of this TSR, enter the PJM TSR ID.
Provider	Primary Provider's code in the EIR. The Entity Role Code of Primary Provider of the Coordinated Request (i.e., this TSR) as it appears in Electric Industry Registry (EIR).
Increment	The increment of service of the Coordinated Request (i.e., this TSR). Only the increments displayed in the drop-down box are permitted for Coordinated Requests.
Class	The increment of service of the Coordinated Request (i.e., this TSR), i.e., Firm or Non-firm.
Type	The type of service of the Coordinated Request (i.e., this TSR), i.e., Point-to-Point or Network.
Disposition	Disposition of the Coordinated Request. Definition is in the Data Dictionary as CR_DISPOSITION

- Attest the Coordinated Group before the Attestation Deadline passes. See section *1.22 Service Across Multiple Transmission Systems ("SAMTS")* of the Regional Practices.
- Withdraw the Coordinated Group.

E. Annulment Requests



You can view and create requests for annulment of service on this page.

Point-to-Point Transmission Service customers may only request early termination or annulment of service if made as an inadvertent error and reported promptly. See section 1.20 of the Regional Practices for more information.

Instructions

Quick Steps

OASIS > My OASIS > Annulment Requests > New Request

Detailed Steps

1) Navigate to and click New Request.



a) From the OASIS Navigation Pane, expand *My OASIS.*

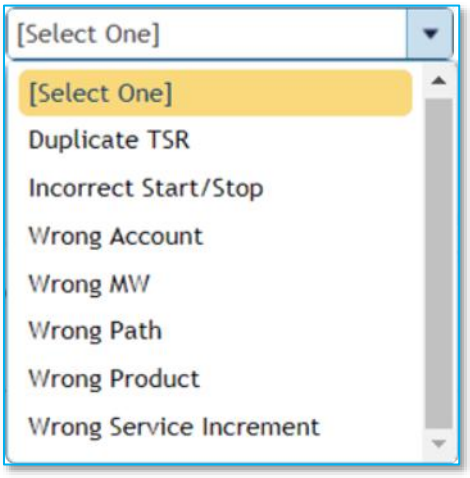
b) Under *My OASIS*, select *Annulment Requests.*

c) Click the New Request button.

2) Complete the *New Annulment Request* dialog.



a) Select a *Reason* from the drop-down box. If none of the listed reasons apply and you believe your TSR is an inadvertent error that should be permitted to be annulled, please contact a PJM OASIS Administrator at oasisadmin@pjm.com very shortly after making the error.



b) In the TSR ID (Original) field, enter the TSR ID of the reservation you submitted in error.

c) In the TSR ID (Replacement) field, enter the TSR ID of the reservation you made that is correct and intended to replace the reservation made in error. In limited cases, a replacement TSR ID is not required.

d) Click Submit.

If the request is approved, you will see APPROVED status in the Annulment Requests tabular page. If the request is not approved, you may click the expand box to the left of your TSR in the Annulment Requests page to view the reason.

F. Company Profile

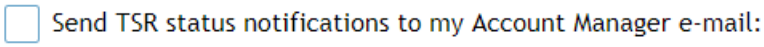
NAESB Registry

View the NAESB Electric Industry Registry (EIR) entity linked to your PJM company account. The "Request NAESB EIR Mapping" button enables a request to create or modify these mappings.

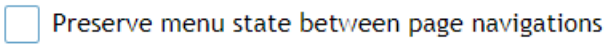
Company Information and Contacts

View the company information that PJM has downloaded from the NAESB EIR. Modifications to the data in this section can only be performed through the NAESB EIR.

User Settings



Enable or disable email notifications.

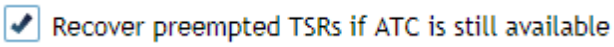


If checked, the left hand navigation menu will not collapse as you navigate.

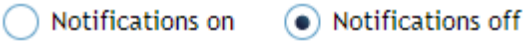


Specify which page you'll land on after logging in to the OASIS.

Company Settings



Specify whether PJM should attempt to re-secure available capacity after your TSR is impacted by a preemption event. (capacity is reduced and given to a Challenger TSR)



Turn company notifications on or off.

- **Buyer Notifications**
  - This email address will receive all communications related to the purchase and/or modification of Transmission Service from PJM
- **Preemption Results**
  - This email address will receive communications related to preemption events that impact your company's previously-purchased Transmission Service
- **Renewal Reminders**
  - This email address will receive reminders related to your company's renewal of previously-purchased Transmission Service

- **Seller Notifications**
  - This email address will receive all communications related to your company's resale of previously-purchased Transmission Service

Renewal Reminder Lead Days – the number of days prior to a rollover deadline marking the time at which PJM should begin sending your company reminders about renewing service

Renewal Reminder Repeat Days – the number of days PJM should wait before repeating the reminder notification. Repeat reminders will be sent until service is renewed or the rollover deadline expires.

Service Agreements

These are the products that your company is permitted to utilize, grouped by service agreement. Requests to access additional products via the execution of additional service agreements should be directed to PJM Member Relations. PJM will periodically review your company's Service Agreement mappings and will unlink products that have not been used for a significant length of time. This maintenance action does not invalidate the executed Transmission Service Agreements that exist between PJM and the Transmission Customer and the related product mappings can be re-implemented upon request.

VI. Available Transfer Capability

The Available Transfer Capability section of the *OASIS Application* is available through your web browser and allows quick access to ATC related actions and information such as availability of service, TSRs from *all* OASIS users, Simultaneous Start results, Security Events that impact ATC, and a list of Transmission Service products.

A. ATC Postings



View postings for sale of service from PJM and Transmission Service customers.

Requesting Service from the ATC Postings page

If you want to reserve short-term Transmission Service (long-term firm and Merchant Primary Provider service follow a different process), the ATC Postings page is a good place to start. ATC Posting means Available Transfer Capability that is available to be purchased. That includes both (a) PJM postings of capability based on system studies and (b) the resale of existing confirmed TSRs by other transmission customers. So complete your search criteria and click *Search* to get started!

Quick steps

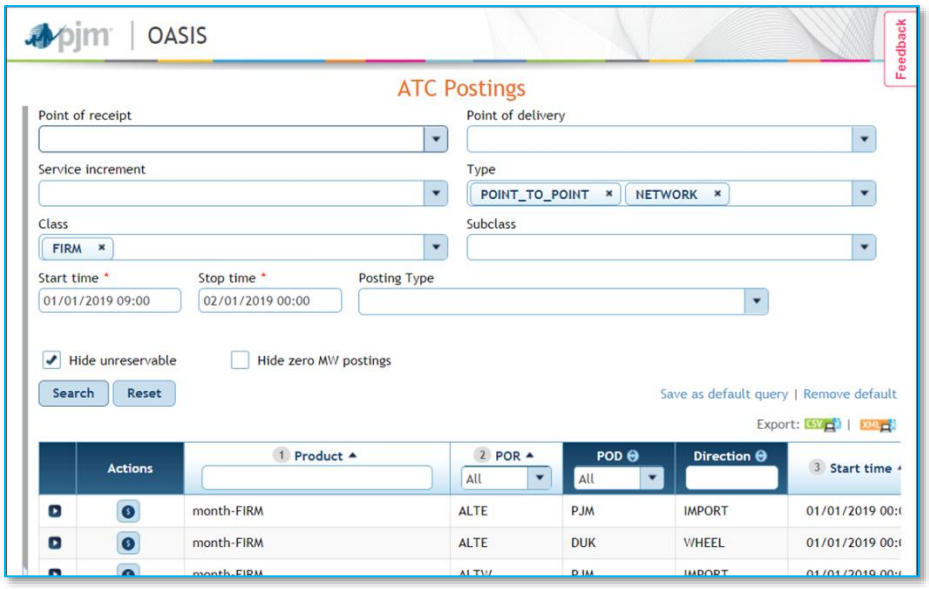
- Enter search criteria. Only start time and stop time are required.
- Click Search and wait briefly for results to be returned.

Click the icon to request service from a specific posting. (Do not forget to check the *Start time*, *Stop time* and *Available* columns.

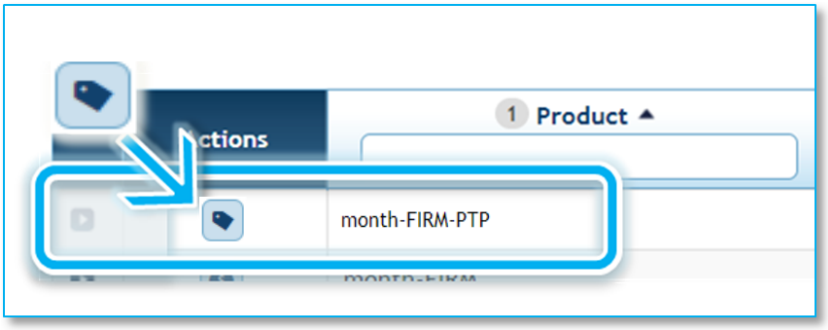
Detailed steps…

1) Available Transfer Capability > *ATC Postings*

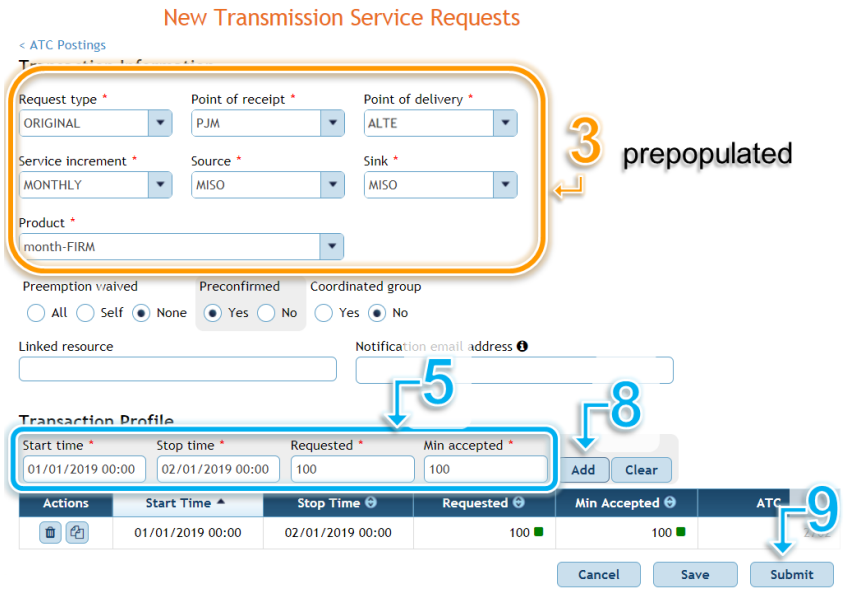
   You will likely not want to view *every* ATC Posting. Apply as many filters as necessary to identify the service that interests you. For example, PJM to ALTE, monthly, firm service for January 2019. **Hint**: collapse the Navigation Pane to fit more columns on the screen.



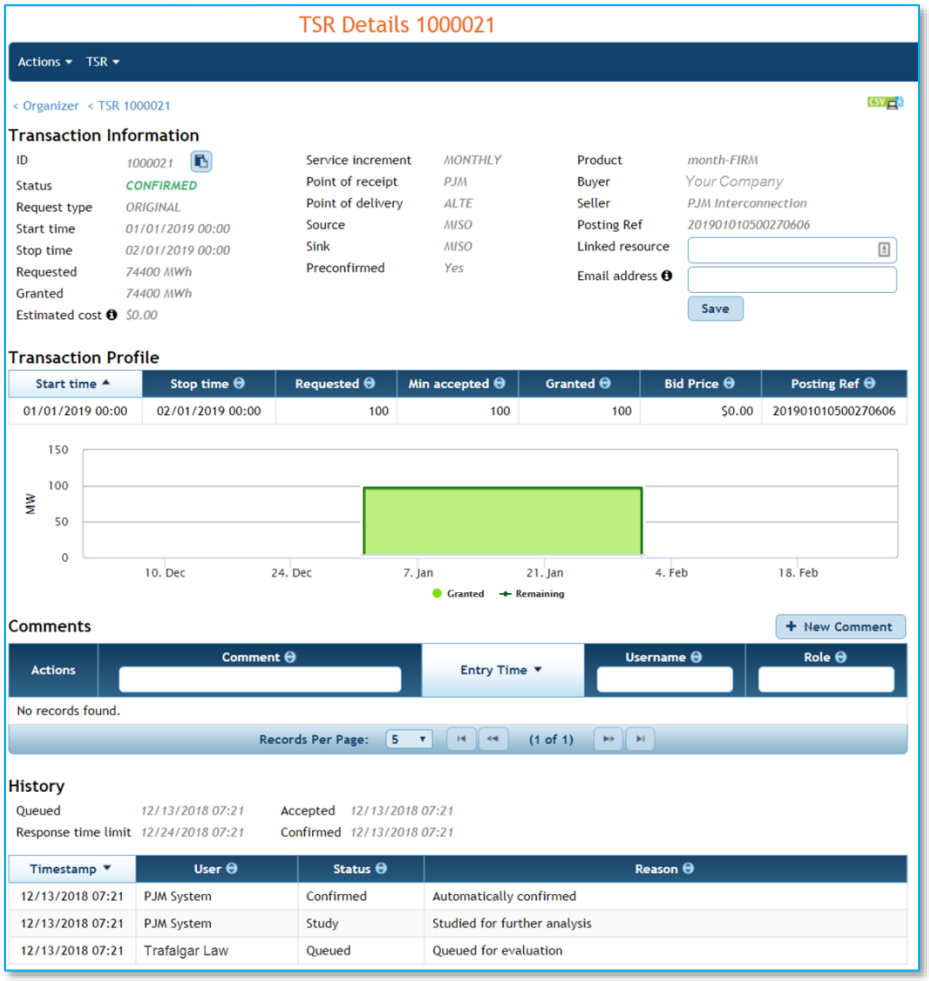
2) Select the posting that corresponds to service you wish to purchase by clicking the icon in the Action column (far left). (Do not forget to check the *Start time*, *Stop time* and *Available* columns.)



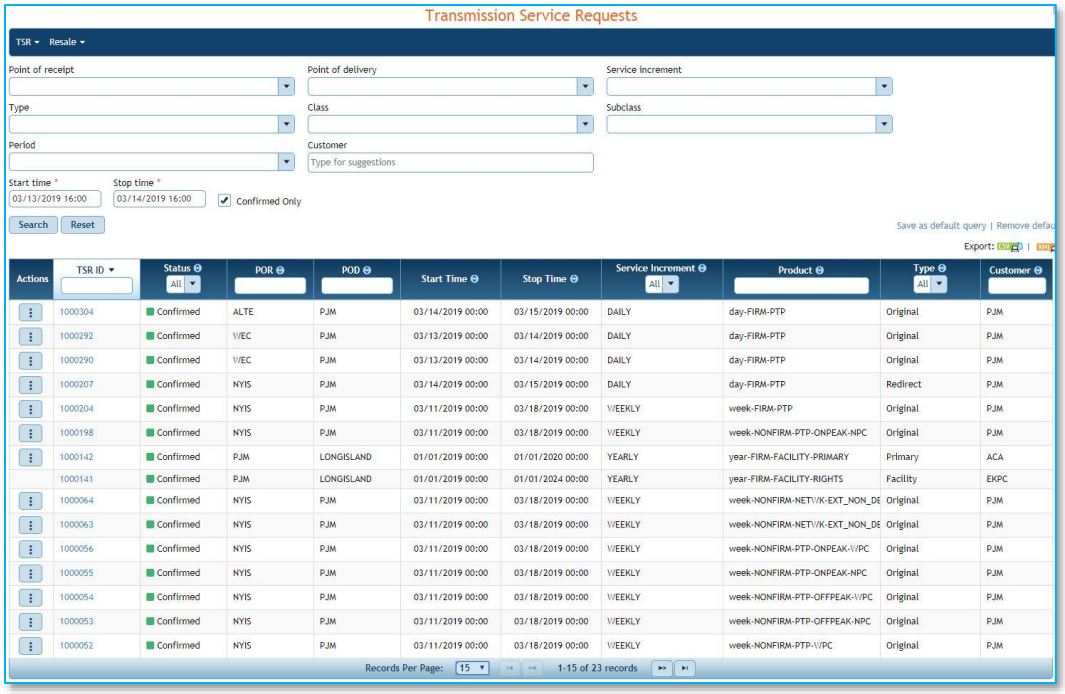
3) Starting from the *ATC Posting* page saves you time by prepopulating fields. The Request type, Point of receipt, Point of delivery, Service Increment, Source, Sink and Product are all prepopulated for you.
   a) You will need to enter the Transaction Profile (Start time, Stop time, Requested, and Min accepted).
4) Start and Stop times are the times for which you want to request service.
5) Requested is your desired amount of capacity in MW.
6) If the requested capacity is not available, what is the minimum you are willing to accept? Enter this value in Min accepted.
7) Click Add to save the profile to your request. If requesting hourly non-firm service, you may optionally add additional rows to your profile by repeating steps 5 and 6. PJM does *not* offer multi-increment service for daily, weekly and monthly increments.
8) Before submitting, make sure you have the proper radio buttons selected for Preemption waived, Preconfirmed, and Coordinated Group
   a) Preemption waived:
      i) All: the new request for service will be evaluated against the posted ATC; the OASIS Application will not review other TSRs to see if they can be preempted to accommodate this request for new service.
      ii) Self = the new request for service will not result in preemption of other requests for service owned by your company; the preemption evaluation stops once your company's existing TSRs would be impacted.
      iii) None = preemption will be evaluated for all the TSRs (both your company's TSRs and other companies' TSRs).
   b) Preconfirmed: If yes, then your TSR will be automatically confirmed upon acceptance by PJM. If no, you will have another chance to withdraw the request upon acceptance.
   c) Coordinated group: If yes, you can coordinate this request with a request on the other system involved in your path. If no, the request will be evaluated by itself.
9) Click Submit to submit your requested service for evaluation. (You can click Save instead if you wish to submit the request at a later time.)



Your resulting reservation, if accepted and confirmed, will look something like the following:



B. Transmission Service Requests



Menu Bar on the Transmission Service Requests



The following menus to the left are available on the Organizer.

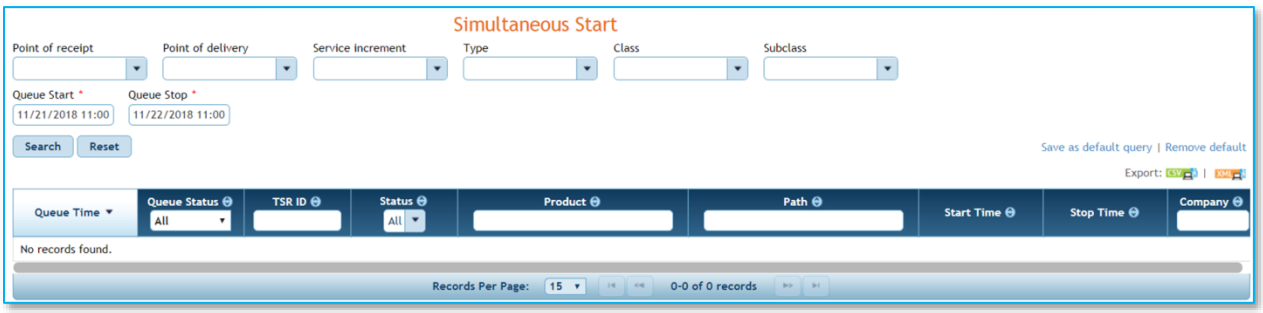
See Chapter VIII: Menus for a description of each menu item.

Actions Icon on the Organizer

Click the context-sensitive *Actions Icon* to see what actions can be performed on a given record (row).

C. Simultaneous Start

View the results of the *Simultaneous Start* evaluation.



You may search (query) simultaneous start results by:

Point of Receipt	*Type*	*Queue Start*
Point of Delivery	*Class*	*Queue Stop*
Service Increment	*Subclass*	

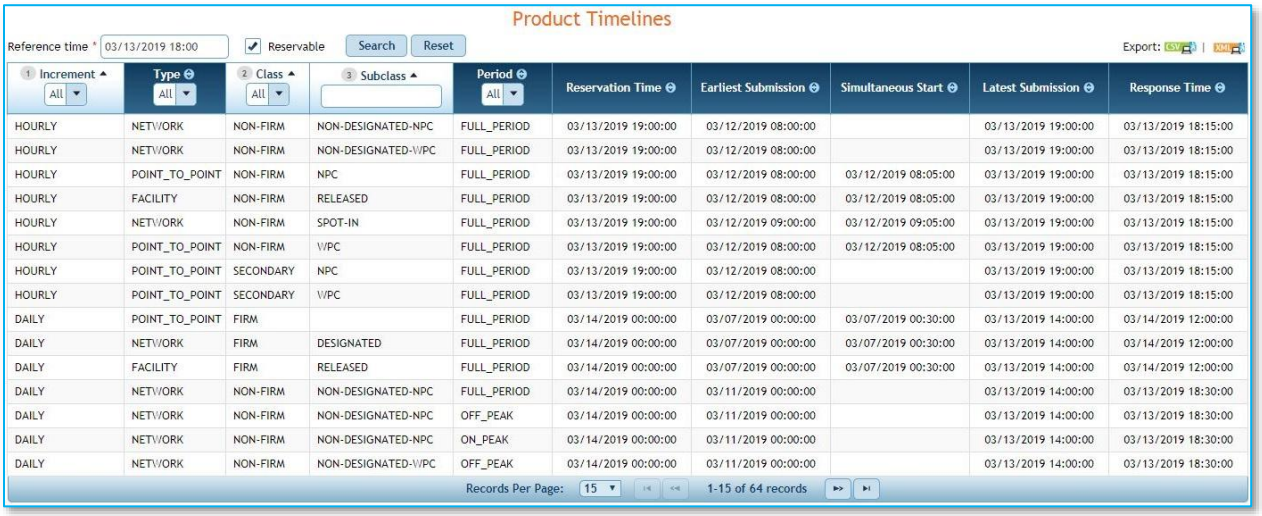
Business Practices

For more information on Simultaneous Start evaluation, see OATT sections *17.8 Reservation of Short-Term Firm Point-To-Point Transmission Service* and *18.3 Reservation of Non-Firm Point-To-Point Transmission Service*.

For Simultaneous Start timing, see Regional Practices section *1.6 Transmission Service Timings*.
Navigation: OASIS Application > Transmission Provider > Regional Practices.

D. Product Timelines

This page will allow you to find the products that are available for purchase based on a reference starting time. This way you can see when you can buy a particular product and for what time period.



Increment	Type	Class	Subclass	Period	Reservation Time	Earliest Submission	Simultaneous Start	Latest Submission	Response Time
HOURLY	NETWORK	NON-FIRM	NON-DESIGNATED-NPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00		03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	NETWORK	NON-FIRM	NON-DESIGNATED-WPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00		03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	POINT_TO_POINT	NON-FIRM	NPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00	03/12/2019 08:05:00	03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	FACILITY	NON-FIRM	RELEASED	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00	03/12/2019 08:05:00	03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	NETWORK	NON-FIRM	SPOT-IN	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 09:00:00	03/12/2019 09:05:00	03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	POINT_TO_POINT	NON-FIRM	WPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00	03/12/2019 08:05:00	03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	POINT_TO_POINT	SECONDARY	NPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00		03/13/2019 19:00:00	03/13/2019 18:15:00
HOURLY	POINT_TO_POINT	SECONDARY	WPC	FULL_PERIOD	03/13/2019 19:00:00	03/12/2019 08:00:00		03/13/2019 19:00:00	03/13/2019 18:15:00
DAILY	POINT_TO_POINT	FIRM		FULL_PERIOD	03/14/2019 00:00:00	03/07/2019 00:00:00	03/07/2019 00:30:00	03/13/2019 14:00:00	03/14/2019 12:00:00
DAILY	NETWORK	FIRM	DESIGNATED	FULL_PERIOD	03/14/2019 00:00:00	03/07/2019 00:00:00	03/07/2019 00:30:00	03/13/2019 14:00:00	03/14/2019 12:00:00
DAILY	FACILITY	FIRM	RELEASED	FULL_PERIOD	03/14/2019 00:00:00	03/07/2019 00:00:00	03/07/2019 00:30:00	03/13/2019 14:00:00	03/14/2019 12:00:00
DAILY	NETWORK	NON-FIRM	NON-DESIGNATED-NPC	FULL_PERIOD	03/14/2019 00:00:00	03/11/2019 00:00:00		03/13/2019 14:00:00	03/13/2019 18:30:00
DAILY	NETWORK	NON-FIRM	NON-DESIGNATED-NPC	OFF_PEAK	03/14/2019 00:00:00	03/11/2019 00:00:00		03/13/2019 14:00:00	03/13/2019 18:30:00
DAILY	NETWORK	NON-FIRM	NON-DESIGNATED-NPC	ON_PEAK	03/14/2019 00:00:00	03/11/2019 00:00:00		03/13/2019 14:00:00	03/13/2019 18:30:00
DAILY	NETWORK	NON-FIRM	NON-DESIGNATED-WPC	OFF_PEAK	03/14/2019 00:00:00	03/11/2019 00:00:00		03/13/2019 14:00:00	03/13/2019 18:30:00

Instructions

1) Enter the Reference Time, which is the time for which you would like to reserve service, for example the service start time. For example:



2) You likely will want to ensure the  box is checked to reduce the returned records to only those that you can reserve. Products like *hour-nonFirm-Secondary* and certain merchant facility products cannot be reserved directly. Contact a PJM OASIS administrator through the Member Hotline with questions regarding product reservability.

3) Click Search.

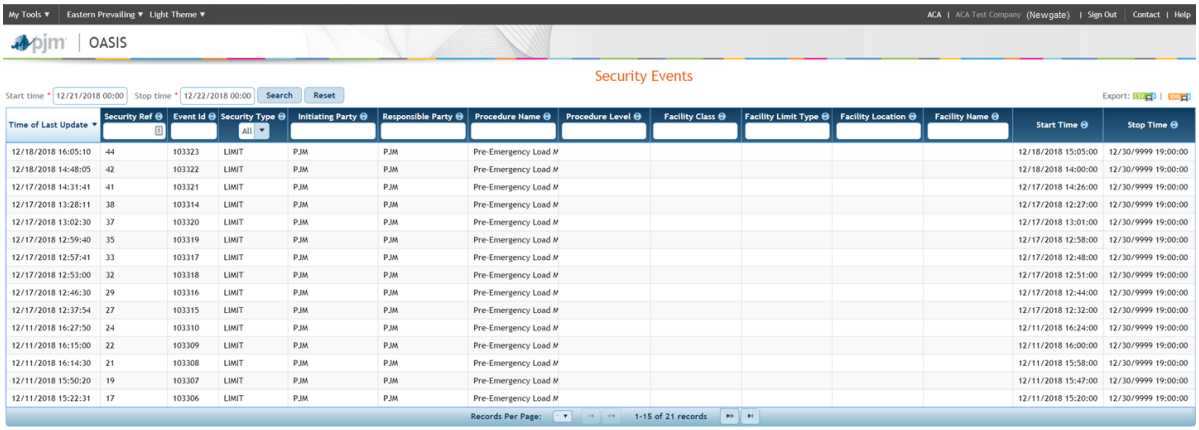
Business Practices

Transmission Service request timings can be found in the regional practices documents found on oasis.pjm.com.

PJM Regional Transmission and Energy Scheduling Practices (contains Table 1.6):
https://www.pjm.com/-/media/etools/oasis/regional-practices-clean-pdf.ashx?la=en

Merchant Transmission Practices:
https://www.pjm.com/markets-and-operations/etools/oasis/merch-trans-facilities.aspx

E. Security Events

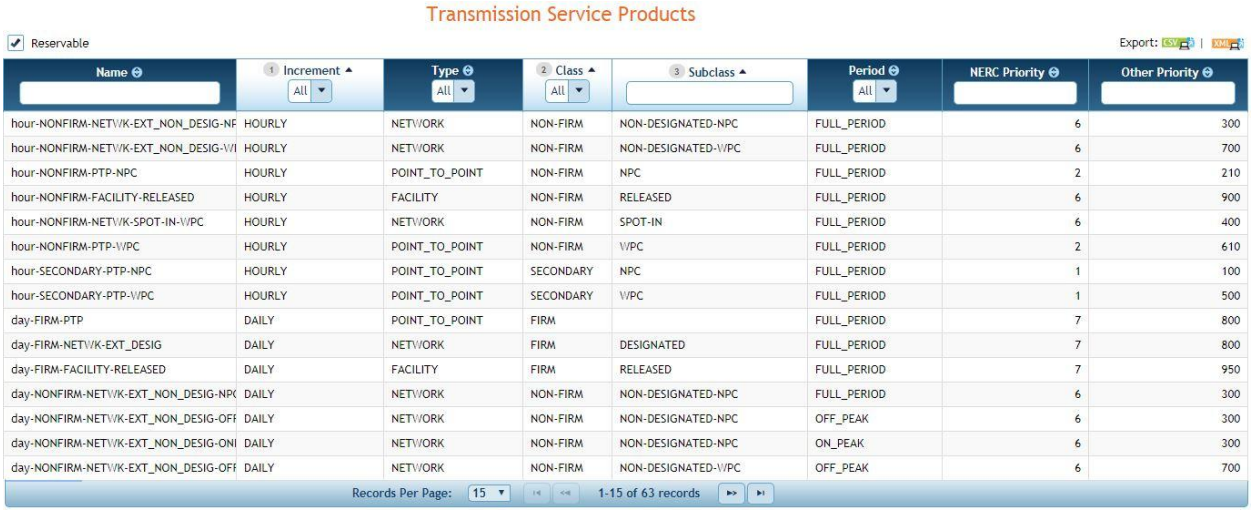


Security Events page lists security events that meet *NAESB WEQ-002* requirements for the security template. You will find events impacting ATC like TLR, flowgate limit changes, Minimum Generation and Maximum Generation on this page.

PJM also recommends you use our *Emergency Procedures* tool to view other important system events. The *Emergency Procedures* tool informs PJM members, PJM personnel and other interested parties about important and/or emergency events as they occur within the PJM Regional Transmission Organization (RTO). Examples of emergency events include hot weather alerts, transmission loading relief (TLR) procedures and minimum generation events. A full list of potential Emergency Procedure events can be found within the tool's Message Definitions tab as well as within the Manual 13: Emergency Operations.

You will find a link to the Emergency Procedures tool on the OASIS information page (INFO.htm) and on the OASIS homepage in the left hand navigation pane: Emergency Procedures.

F. Transmission Service Products

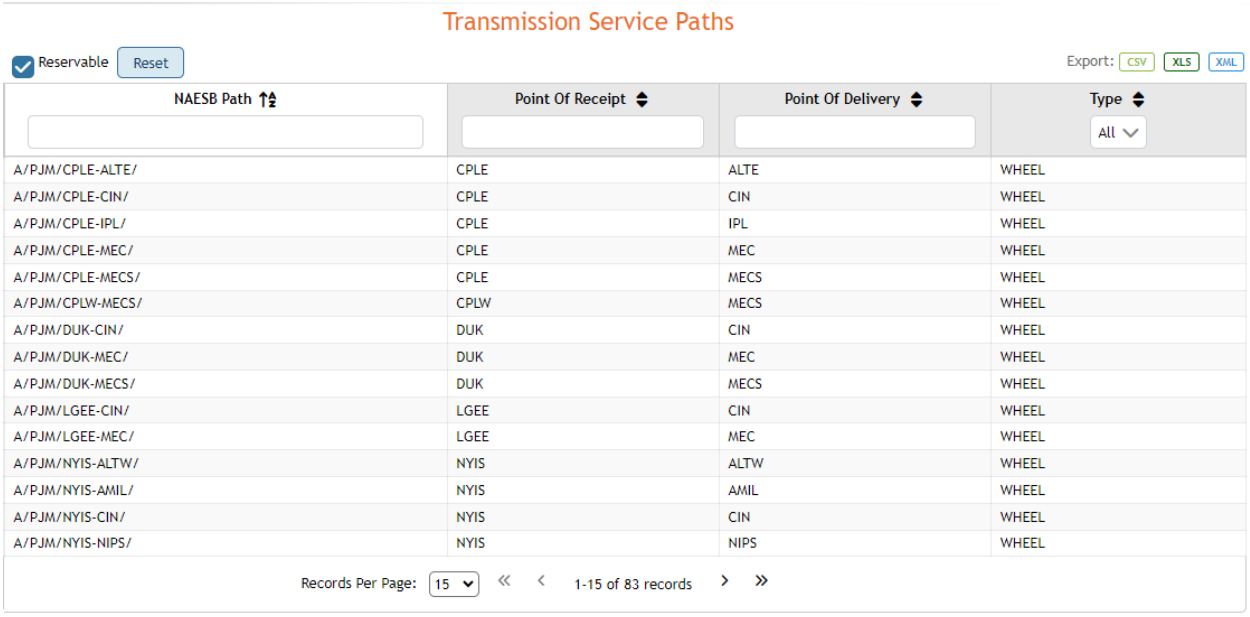


The *Transmission Service Products* page displays a table of all products in the OASIS Application.

Use the filters in the headings to quickly narrow down the list to the product(s) that interest you.

Some products are not directly available for purchase. For example, the Open Access Transmission Tariff provides for secondary use of firm service on a non-firm basis over secondary POR and POD. *Secondary-hour-NF* is one such product. By default, these products are not displayed. You may unhide these products by deselecting the '☐ Reservable' checkbox.

G. Transmission Service Paths



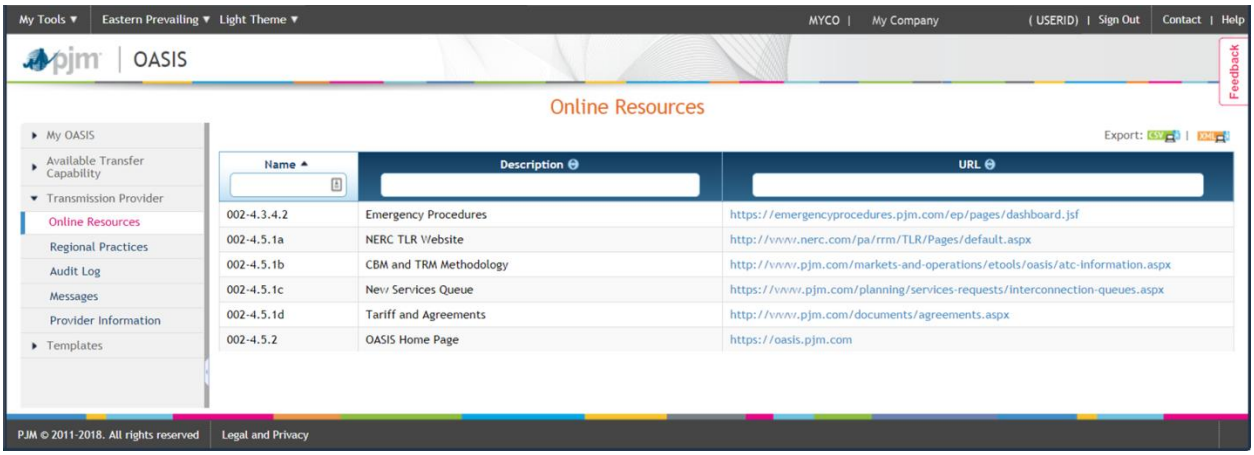
The *Transmission Service Paths* page displays a table of all paths in the OASIS Application.

Use the filters in the headings to quickly narrow down the list to the path(s) that interest you.

Some paths may not be available for purchasing Transmission Service. By default, these paths are not displayed. You may unhide these paths by deselecting the '☐ Reservable' checkbox.

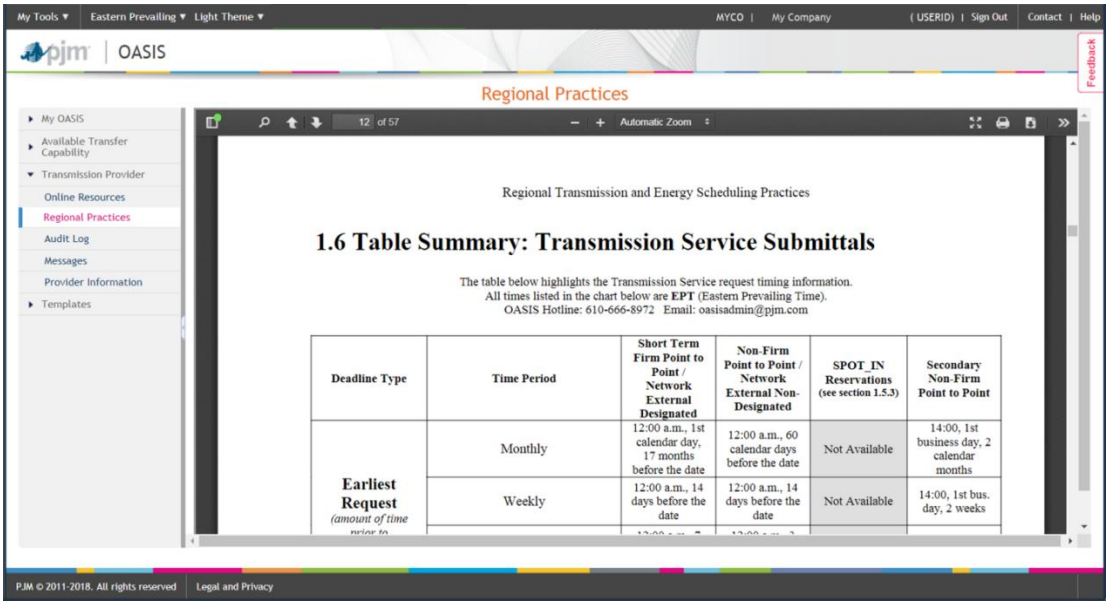
VII. Transmission Provider

A. Online Resources



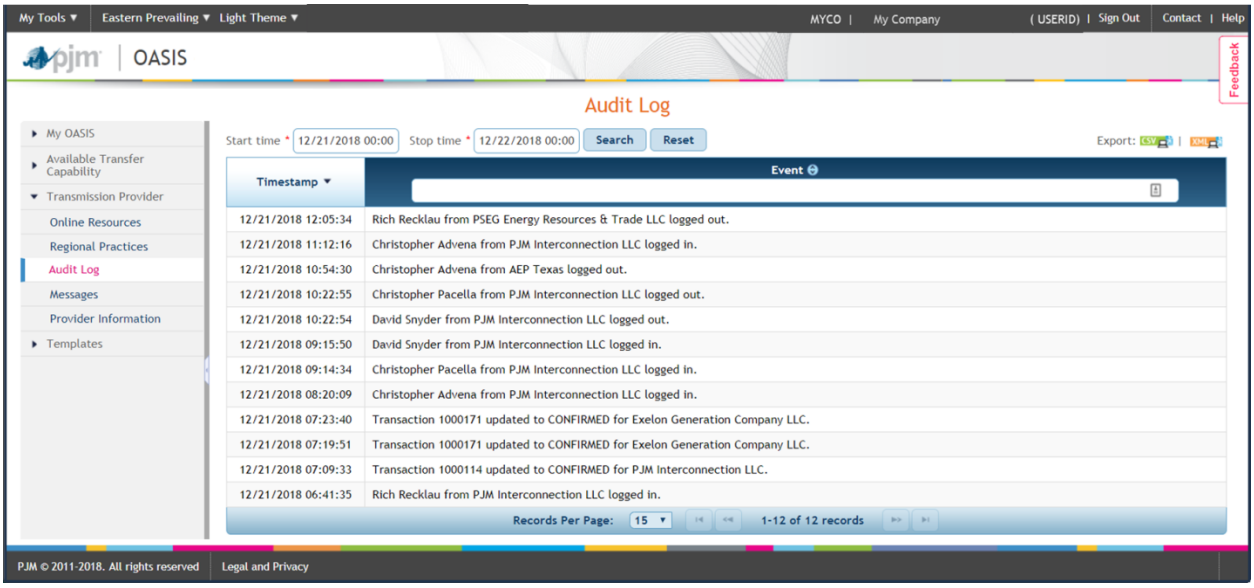
The *Online Resources* page provides the information in the NAESB-required info.htm, which is a list of resources that may be helpful to customers using the OASIS. This includes PJM tools such as Emergency Procedures, PJM documents like the Open Access Transmission Tariff, and even external resources like the NERC TLR website.

B. Regional Practices



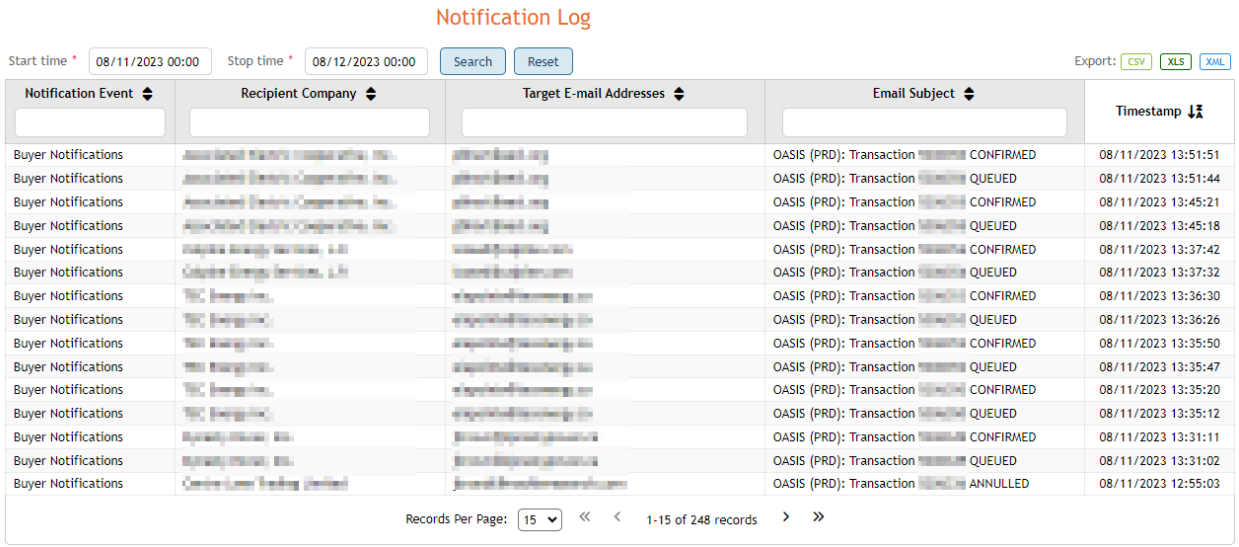
The *Regional* Practices page provides an electronic version of PJM's Regional Practices document inside the OASIS. The toolbar above the Regional Practices allows for quick navigation.

C. Audit Log



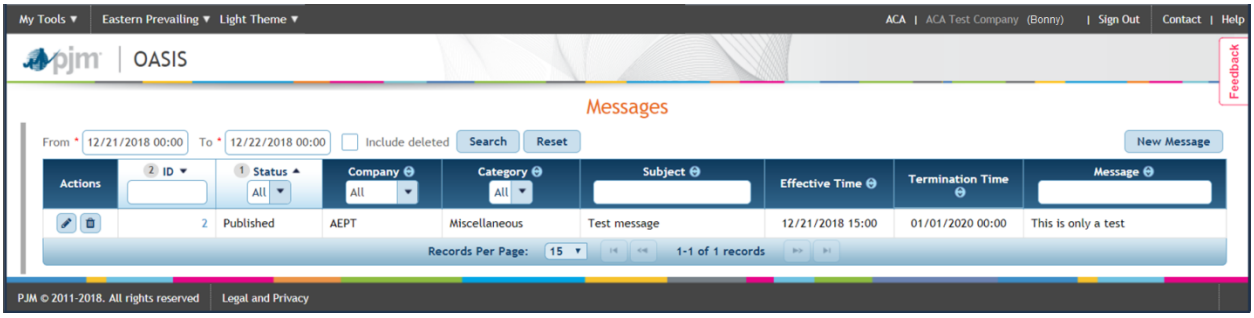
The *Audit Log* provides a list of events that have occurred within the PJM OASIS.

D. Notification Log



The *Notification Log* provides a list of all notifications sent by the PJM OASIS.

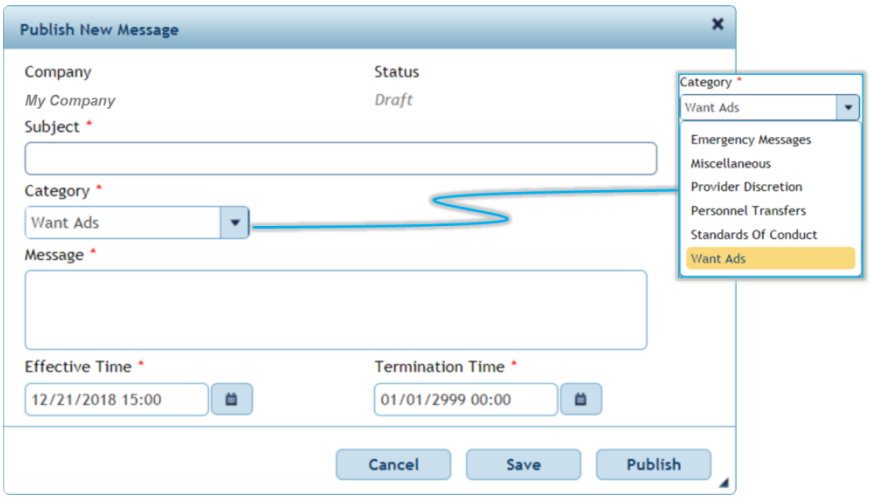
E. Messages



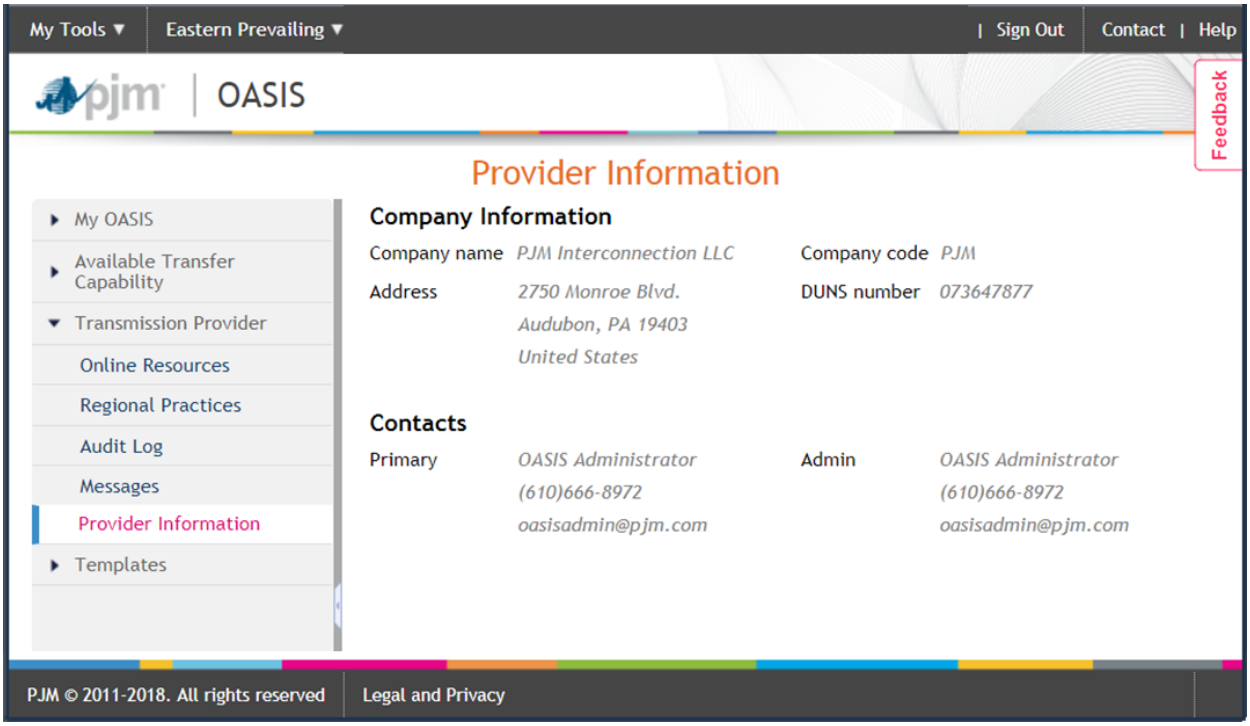
The *Messages* page displays OASIS Messages posted by the Transmission Service Provider (i.e., PJM) and other OASIS Application users. These messages can be created and viewed by OASIS users with any level of access (including Read Only).

Click New Message to post a message.

Complete the form and click Save or Publish. Only you can see your saved messages. Publish the message to make it available to all OASIS users.



F. Provider Information



See information about PJM.

VIII. Templates

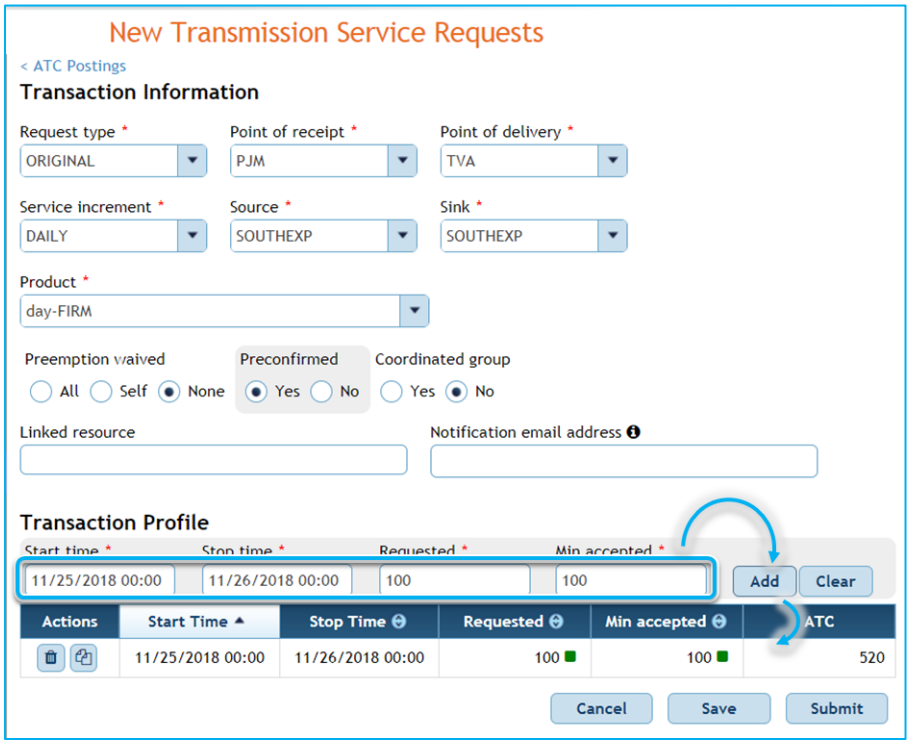
Templates are described in the PJM OASIS API User Guide.

IX. Forms and Dialogs

Many OASIS Application pages provide menu items and actions that invoke forms or dialogs that are not directly available in the Navigation Pane. Those forms and dialogs are covered in this chapter.

A. New Transmission Service Requests Form

The *New Transmission Service Requests* form allows you to enter a request for Transmission Service. It is available through TSR Menu items: *Create new TSR…*, *Create ORIGINAL from existing TSR…* and *Duplicate existing TSR…*. You can also access this form from the ATC Postings page by clicking (the *Reserve* button) in the Actions column of any posting.



Note that the form is context sensitive.

1) The Preemption waived selections appear only for firm service eligible for preemption in accordance with the PJM Open Access Transmission Tariff. See *(1)(g) Preemption waived* in the instructions below for a description of the options.

2) The *Coordinated group* selections appear only for requests that meet the business criteria for Coordinated Groups described in section *1.22 Service Across Multiple Transmission Systems ("SAMTS")* of the Regional Practices. See *(1)(i) Coordinated group* in the instructions below for a description of the options.

Instructions

1) Enter:
   a) Request type: select from in-cell menu.
   b) Point of receipt: to export, select PJM; otherwise select a neighboring balancing authority area from in-cell drop-down menu.
   c) Point of delivery: to import, select *PJM*, otherwise select a neighboring balancing authority area from in-cell drop-down menu.
   d) Service Increment: select *HOURLY*, *DAILY*, *WEEKLY*, *MONTHLY*, or *YEARLY* from the in-cell menu
   e) Source and Sink: select source and sink from the in-cell drop-down menu.
   f) Product: select a product from the in-cell menu.
   g) Preemption waived:
      i) All: the new request for service will be evaluated against the posted ATC; the OASIS Application will not review other TSRs to see if they can be preempted to accommodate this request for new service.
      ii) Self = the new request for service will not result in preemption of other requests for service owned by your company; the preemption evaluation stops once your company's existing TSRs would be impacted.
      iii) None = preemption will be evaluated for all the TSRs (both your company's TSRs and other companies' TSRs).
   h) Preconfirmed: Select *Yes* or *No*.
      i) Yes: if PJM places your TSR in ACCEPTED status, the OASIS will automatically confirm it on your behalf. The TSR will automatically move from ACCEPTED to CONFIRMED status.
      ii) No: if PJM places your TSR in ACCEPTED status, you (or another user from your company) will have the responsibility to confirm the request within the customer response time.
   i) Coordinated group: Select *Yes* or *No*. For more information, see section 1.22 Service Across Multiple Transmission Systems (SAMTS) of the Regional Practices.
   j) Linked resource: For external pseudo-tie gen/load or external RPM resource.
   k) Notification email address: Third option for an email address for PJM to send service request updates to for this specific request (If different from the NAESB EIR contact or address selected in your Company Profile).
      i) Enter Transaction Profile.
2) Save or Submit
   a) Save: save the data for later submission; it will not be evaluated. Retains a TSR ID.
   b) Submit: submit the request for evaluation.

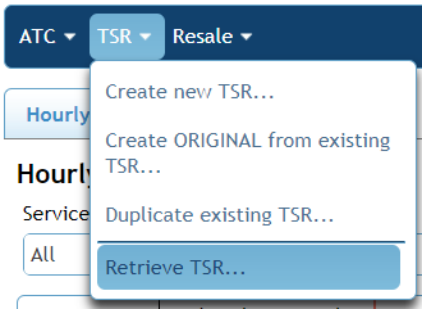
Navigation

You can navigate to the *New Transmission Service Requests* dialog from within the *OASIS Application* as follows.

- Organizer > TSR menu > Create new TSR…
- Available Transfer Capability > Transmission Service Requests > TSR menu > Create new TSR…
- Available Transfer Capability > ATC Postings > Enter in all the information, then search for postings > Click for your desired service

B. Retrieve TSR

Organizer > TSR menu > Retrieve TSR…

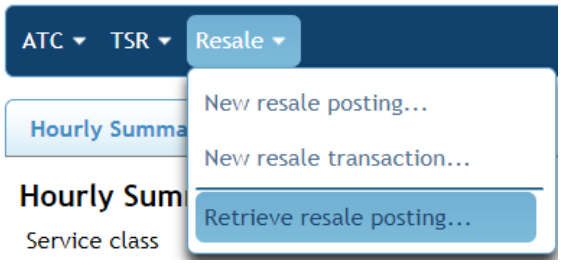


Retrieve a TSR by *TSR ID*:



C. Retrieve Resale Posting

Organizer > Resale menu > Retrieve resale posting…



Retrieve a resale posting by *Posting ID*:



X. Common Tasks for Users of the Browser Interface

A. Request Transmission Service

You can request service from several places. Most people elect to begin with the *ATC Postings* page.

Find service for sale

Search on the *ATC Postings* page for the service that interests you and then click  to open the *New Transmission Service Requests* dialog. More information can be found in section VI of this guide.

New Transmission Service Request dialog

You can also find the *New Transmission Service Requests* dialog in the TSR Menu. (see Section IX. A)

B. View my TSRs

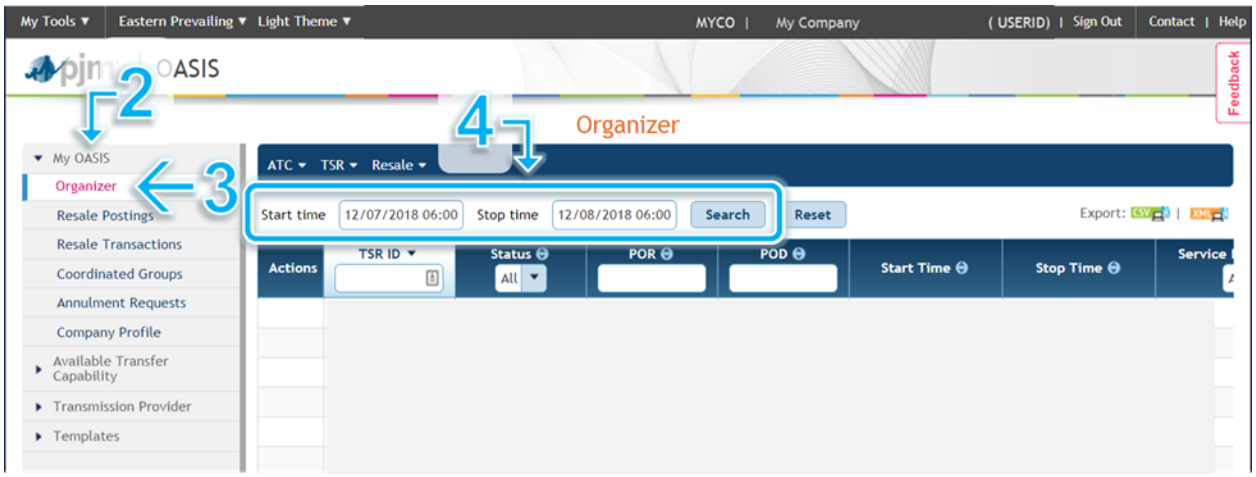
Instructions

Quick Steps

OASIS Application > My OASIS > Organizer

Detailed Steps

1) Log in to the OASIS Application.



2) In the Navigation Pane, click the expand icon (▸) to expand My OASIS.
3) Click on Organizer.
4) Select the My TSRs tab.
5) Select a timeframe and click Search. The OASIS will return all of your company's reservations that overlap the start and stop times you entered.

C. Determine how much capacity is remaining on a reservation

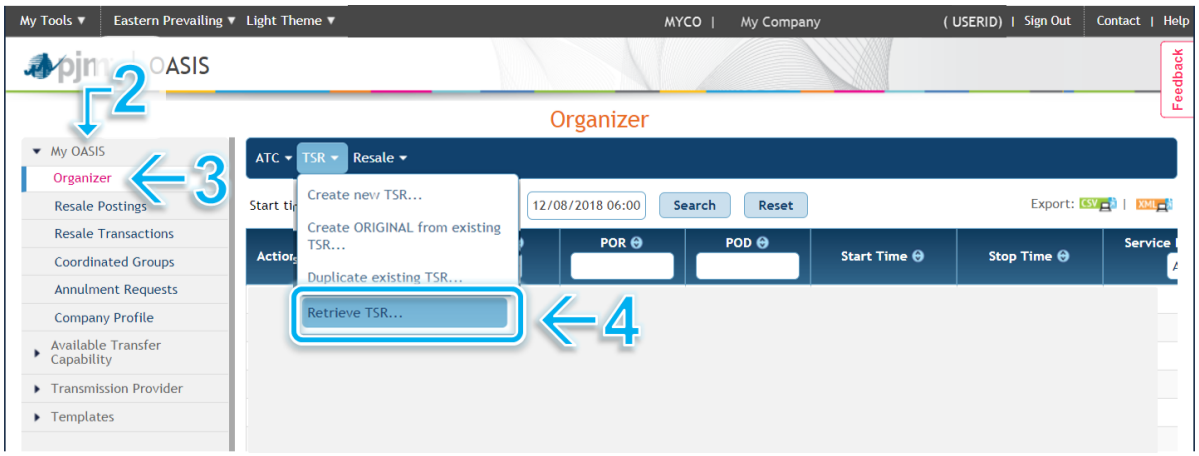
Instructions

Quick Steps

OASIS Application > My OASIS > TSR Menu > Retrieve TSR…

Detailed Steps

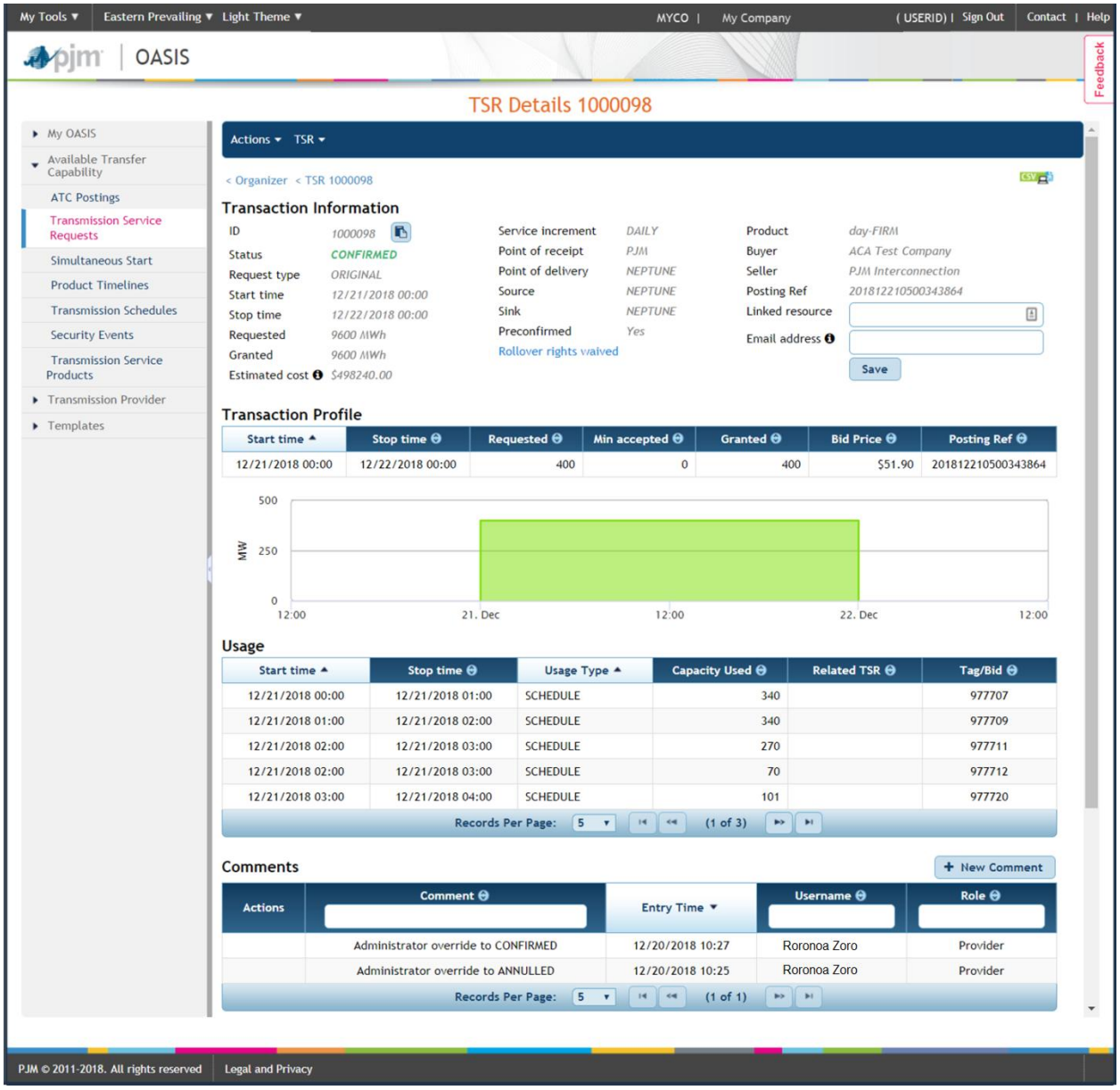
1) Log in to the OASIS Application.



2) In the Navigation Pane, click the expand icon (▸) to expand My OASIS.
3) Click on Organizer.
4) From the TSR Menu, select Retrieve TSR….



5) Scroll down to the Usage section and subtract the Capacity Used from your Granted MW. This will be the MW remaining for you to use.



D. Post Transmission Service for resale

Instructions

1) OASIS Application > MY OASIS > Organizer.
2) In the Organizer, locate the TSR to resell.
3) Click on the TSR ID to open the TSR Details page.
4) From the Reservation Details page, view the Transaction Profile and Usage sections of the page to determine the amount of capability left that can use resold.
5) Go to the Action menu and select the resell option.

For further instructions, go to the section on New resale postings.

E. Request annulment of Spot-in

Instructions

1) OASIS Application > Transmission Provider > Regional Practices > Table 1.6.
   Review the timing of both automatic and manual release of spot-in service.
2) OASIS Application > MY OASIS > Annulment Requests.

For further instructions, to Annulment Requests.

F. Request long-term firm Point-to-Point or Network Service

Instructions

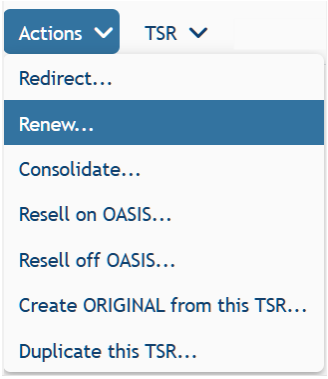
1) OASIS Application > My OASIS > Organizer > TSR Menu > Create new TSR…
2) Most customers request service that begins on June 1 of a year and end on June 1 of a subsequent year, because this aligns with PJM planning analysis and the PJM capacity market. You may however elect any start date in the future (must be the first day of the month) and any stop date at least one year after the start date. Planning analysis can take from several months to several years depending on a number of factors. For more information, contact PJM and request information from either the Transmission Service or Transmission Planning department.
3) Complete your request for service as per the New Transmission Service Request Form.
4) After submitting the TSR, you will move to the LTF Application Form. Fill out this form and PJM will contact you for any follow up.

G. Request Renewal of long-term firm Service

When an organization wishes to exercise their rollover rights, they may do so on the OASIS by issuing a Renewal request on the existing LTF TSR.

Instructions

1) OASIS Application > TSR Detail > Actions Menu > Renew…

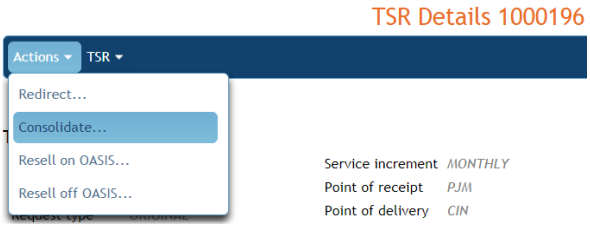


2) This will bring you to the New Transmission Service Request screen.
3) The OASIS will autofill all of the fields to match the parent TSR. Add the Transaction Profile and Submit.
4) After submitting the TSR, you will move to the Signatory Form. Fill out this form and PJM will contact you for any follow up.

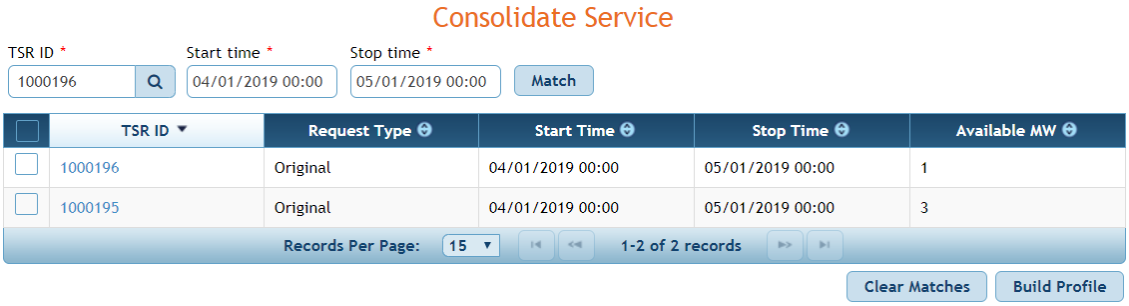
H. Request Consolidation of Monthly Service

Instructions

1) OASIS Application > TSR Detail (for one of the TSRs you want to consolidate) > Actions Menu > Consolidate…



2) This will bring you to the Consolidate Service screen where by selecting Match, you can find a list of service that has the same attributes and is eligible for consolidation.



3) Select the TSRs that you want to Consolidate and Build Profile.

4) Once you have all desired TSRs added to the profile you can submit the request to make a new Consolidation TSR

    a. This will show up as usage on the old TSRs

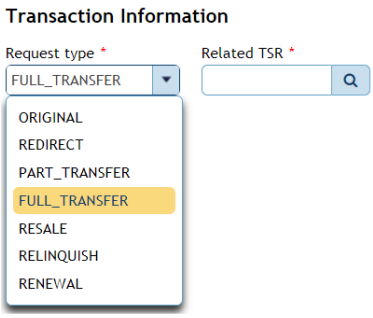
I. Request a Transfer of Monthly or Yearly Service

Instructions

Note: The Buyer of the Transfer must submit the Transfer TSR

1) OASIS Application > My OASIS > Organizer > TSR Menu > Create new TSR…

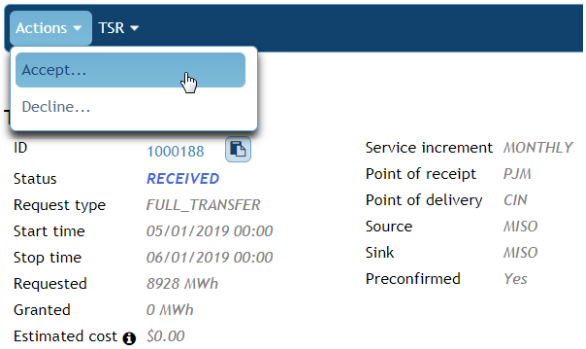
2) Change Request type to FULL_TRANSFER if you want all of the service and PART_TRANSFER if you only want a portion of the service. Enter the ID of the TSR that you want to Transfer under Related TSR and search.



3) The OASIS will autofill all of the fields to match the ORIGINAL TSR. Add the Transaction Profile and Submit.

4) The Transfer TSR will go to RECEIVED. Wait for the owner of the ORIGINAL TSR to Accept the Transfer. Wait for PJM to Accept the Transfer.

5) Note: If you are the owner of the Original TSR, you can accept the TSR by using the TSR menu on the Organizer page and Retrieve the Transfer TSR. Then Accept it by using the Actions menu



XI. Revision History

March 2019

- New User Guide created to reflect the re-write of OASIS application and implementation of the CLI.

August 2019

- Sections III.B and VII.D updated to reflect retirement of Legacy OASIS roles 'Transaction' and 'Message'.

March 2020

- Updated to reflect changes incorporated into the OASIS application since go-live in 2019.
- Updated with minor changes associated with a periodic review of the guide.

October 2020

- Updated with minor cosmetic changes and cleanup associated with a periodic review of the guide.

April 2021

- Updated with minor cosmetic changes and enhancements related to the implementation of the NAESB v3.2 Business Practice Standards.

November 2021

- Section X.F – specified that LTF must start on the first day of the month

November 2022

- Updated various broken hyperlinks

August 2023

- Various administrative changes
- Updated Section III.C to reflect changes in the navigation pane
- Updated Section V.F to describe changes to notifications and to describe PJM's maintenance actions related to mapped products.
- Created Section VI.G to describe the Transmission Service Paths page
- Renamed Section VII.D Messages to VII.E Messages
- Created a new Section VII.D to describe the Notification Log page

February 2025

- Updated with minor cosmetic changes and inserted Section X.G to describe the Renewal process

July 2026

- Updated description of Relinquish under section IV.A. by striking 'non-firm' in accordance with NAESB 4.0 requirement changes.