



# MSRS Technology Refresh Mockup

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Tech Change Forum

February 21, 2020

- Improve browser compatibility
- Create consistent User Interface (UI) look and feel, similar to other PJM Tools
- Create supportable framework for PJM development staff to manage new report development and changes
- Implement standard token-based security for authentication

- Maintain current SUMA capability
- Improve report request throughput
- Support enhanced functionality
- Minimize impact to users for browserless report requests
  - Maintain API protocols and standards



My Tools | PJM (USER) | Sign Out | Contact | Help

**pjm** | MSRS

ORGABC

Application related messages will display here

Recent Billing | Billing Details | Reports | Download List (0)

### Recent Billing

**November 2019** In Progress

Charges	\$21,172.00
Credits	\$2,880.00
<b>Net total</b>	<b>\$24,052.00</b>

**Week to date** Invoices

11/1 - 11/7	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
11/1 - 11/14	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
11/1 - 11/21	In Progress	
11/1 - 11/28	Not Started	
11/1 - 11/30	Not Started	
Month to date	In Progress	<a href="#">XML</a> <a href="#">CSV</a>

**December 2019** Not Started

Billing cycle begins on 12/1

**Quick Resources/Announcements**

Next payment due Nov 12, 2019

- [View billing calendar](#)
- [PJM billing statement line items](#)
- [Customer guide to billing](#)
- [MSRS report dictionary](#)
- [Accounting Mmanuals](#)
- [Open Access Transmission Tariff items](#)
- [Operating Agreement](#)

**October 2019** Finalized

Charges	\$21,172.00
Credits	\$2,880.00
Previously billed total	\$28,987.00
<b>Net total</b>	<b>\$24,052.00</b>

**Week to date** Invoices

10/1 - 10/7	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
10/1 - 10/14	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
10/1 - 10/21	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
10/1 - 10/28	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
10/1 - 10/31	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Monthly statement	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Month to date	Finalized	<a href="#">XML</a> <a href="#">CSV</a>

**September 2019** Finalized

Charges	\$21,172.00
Credits	\$2,880.00
Previously billed total	\$28,987.00
<b>Net total</b>	<b>\$24,052.00</b>

**Week to date** Invoices

9/1 - 9/7	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
9/1 - 9/14	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
9/1 - 9/21	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
9/1 - 9/28	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
9/1 - 9/31	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Monthly statement	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Month to date	Finalized	<a href="#">XML</a> <a href="#">CSV</a>

**August 2019** Finalized

Charges	\$21,172.00
Credits	\$2,880.00
Previously billed total	\$28,987.00
<b>Net total</b>	<b>\$24,052.00</b>

**Week to date** Invoices

8/1 - 8/7	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
8/1 - 8/14	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
8/1 - 8/21	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
8/1 - 8/28	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
8/1 - 8/31	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Monthly statement	Finalized	<a href="#">XML</a> <a href="#">CSV</a> <a href="#">PDF</a>
Month to date	Finalized	<a href="#">XML</a> <a href="#">CSV</a>

# Recent Billing

High-level summary of recent billing activity

View weekly & monthly Month-to-Date Bill for current month

View billing activity for past 3 months

Quick links to pjm.com resources

Download finalized weekly & monthly invoices, monthly Month-to-Date Bill



Month-to-Date Bill:  
weekly/monthly  
view

XML & CSV downloads

Filter by Billing  
Line Item ID or  
Name

### Billing Details

Billing Month   Month to Date  Invoice Billing Period    Customer ID 1234567 Short name

November 2019 - Month to Date

11/1/2019 - 11/30/2019

Monthly Billing Net Total \$22,000.00  
Last Weekly Billing Total \$12,000.00  
Total Due / Receivable \$34,000.00

**Charges**

ID	Line Item	Adjustments	Source Date	Current Amount	11/1/2019	11/2/2019	11/3/2019	11/4/2019	11/5/2019	11/6/2019	11/6/2019
1100	Network Integration Transmission Service			0	0	0	0	0	0	0	0
1130	Firm Point-to-Point Transmission Service*			0	0	0	0	0	0	0	0
1140	Non-Firm Point-to-Point Transmission Service			0	0	0	0	0	0	0	0
1200	Day-ahead Spot Market Energy			0	0	0	0	0	0	0	0
1205	Balancing Spot Market Energy			0	0	0	0	0	0	0	0
1210	Day-ahead Transmission Congestion			0	0	0	0	0	0	0	0
1215	Balancing Transmission Congestion			0	0	0	0	0	0	0	0
1220	Day-ahead Transmission Losses			0	0	0	0	0	0	0	0
1225	Balancing Transmission Losses			0	0	0	0	0	0	0	0
1301	PJM Scheduling, System Control and Dispatch Service - Control Area Administration			0	0	0	0	0	0	0	0
1302	PJM Scheduling, System Control and Dispatch Service - FTR Administration			0	0	0	0	0	0	0	0
1303	PJM Scheduling, System Control and Dispatch Service - Market Support			0	0	0	0	0	0	0	0
1304	PJM Scheduling, System Control and Dispatch Service - Regulation Market Administration			0	0	0	0	0	0	0	0
1305	PJM Scheduling, System Control and Dispatch Service - Capacity Resource/Obligation Mgmt.			0	0	0	0	0	0	0	0
1320	Transmission Owner Scheduling, System Control and Dispatch Service			0	0	0	0	0	0	0	0
1370	Day-ahead Operating Reserve			0	0	0	0	0	0	0	0
1375	Balancing Operating Reserve			0	0	0	0	0	0	0	0
1380	Black Start Service^			0	0	0	0	0	0	0	0
<b>Total charges</b>				<b>87.5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Credits**

ID	Line Item	Adjustments	Source Date	Current Amount	11/1/2019	11/2/2019	11/3/2019	11/4/2019	11/5/2019	11/6/2019	11/6/2019
2100	Network Integration Transmission Service			0	0	0	0	0	0	0	0
2130	Firm Point-to-Point Transmission Service			0	0	0	0	0	0	0	0
2140	Non-Firm Point-to-Point Transmission Service			0	0	0	0	0	0	0	0
2220	Transmission Losses			0	0	0	0	0	0	0	0
2320	Transmission Owner Scheduling, System Control and Dispatch Service			0	0	0	0	0	0	0	0
2340	Regulation and Frequency Response Service			0	0	0	0	0	0	0	0
2360	Synchronized Reserve			0	0	0	0	0	0	0	0
<b>Total charges</b>				<b>87.5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Net total</b>				<b>87.5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Footnotes**

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# Billing Details

Filter by  
specific billing  
period

Adjustments  
& Source date



Finalized Invoice: weekly/monthly view

XML, CSV & PDF downloads

Filter by Billing Line Item ID or Name

**Billing Details**

Billing Month:   Month to Date  Invoice Billing Period:    Customer ID: 1234567 Short name: [REDACTED]

**October 2019 - Monthly Statement**    Charges: \$97,079.00 Credit: \$2,880.00 Net total: \$99,959.00

10/1/2019 - 10/31/2019

**Charges**

ID	Line Item	Adjustments	Source Date	Current Amount	BLI Associated Reports
1100	Network Integration Transmission Service			999999.00	5 reports
1130	Firm Point-to-Point Transmission Service*			0	4 reports
1140	Non-Firm Point-to-Point Transmission Service			999999.00	7 reports
1200	Day-ahead Spot Market Energy			0	2 reports
1205	Balancing Spot Market Energy			999999.00	0 reports
1210	Day-ahead Transmission Congestion			2559241.17	3 reports
1215	Balancing Transmission Congestion	A	10/1/2019	25.00	5 reports
1220	Day-ahead Transmission Losses			0	5 reports
1225	Balancing Transmission Losses			0	4 reports
1301	PJM Scheduling, System Control and Dispatch Service - Control Area Administration			0	7 reports
1302	PJM Scheduling, System Control and Dispatch Service - FTR Administration			0	2 reports
1303	PJM Scheduling, System Control and Dispatch Service - Market Support			0	0 reports
1304	PJM Scheduling, System Control and Dispatch Service - Regulation Market Administration			0	3 reports
1305	PJM Scheduling, System Control and Dispatch Service - Capacity Resource/Obligation Mgmt.			0	5 reports

**Credits**

ID	Line Item	Adjustments	Source Date	Current Amount	BLI Associated Reports
2100	Network Integration Transmission Service			0	5 reports
2130	Firm Point-to-Point Transmission Service*			0	4 reports
2140	Non-Firm Point-to-Point Transmission Service			0	7 reports
2220	Transmission Losses			0	2 reports
2320	Transmission Owner Scheduling, System Control and Dispatch Service			0	0 reports
2330	Reactive Supply and Voltage Control from Generation and Other Sources Service			2559241.17	3 reports
2340	Regulation and Frequency Response Service	A	9/1/2019	-0.1	5 reports
2130	Firm Point-to-Point Transmission Service*			0	4 reports
2140	Non-Firm Point-to-Point Transmission Service			0	7 reports
2220	Transmission Losses			0	2 reports
2320	Transmission Owner Scheduling, System Control and Dispatch Service			0	0 reports
2330	Reactive Supply and Voltage Control from Generation and Other Sources Service			0	3 reports
2340	Regulation and Frequency Response Service	A	9/1/2019	-0.1	8 reports

**Footnotes**

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# Billing Details

Adjustments & Source date

BLI Associated Reports

# Billing Details - BLI Associated Reports

ID	Line Item	Adjustments	Source Date	Current Amount	BLI Associated Reports
<input type="text"/>	<input type="text"/>				
1100	Network Integration Transmission Service			999999.00	5 reports
1130	Firm Point-to-Point Transmission Service*			0	4 reports

List of reports that can be used to calculate the BLI charge or credit

Ability to select & add these reports to the download list

**Reports Associated with Selected Billing Line Item** ✕

<input type="checkbox"/>	Category	Name
<input type="checkbox"/>	Operating Reserve	Balancing Operating Reserve for Load Response Credit
<input type="checkbox"/>	Operating Reserve	Day-Ahead Operating Reserve for Negative Congestion Summary
<input type="checkbox"/>	Operating Reserve	Operating Reserve for Load Response Charge Allocation (Pre FERC 745 (04.01.2012))
<input type="checkbox"/>	Energy	Emergency Energy Transactions
<input type="checkbox"/>	Energy Transaction Details	DA Daily Energy Transactions

Cancel Add to List



Recent Billing | Billing Details | **Reports** | Download List (0)

Start date: 7/1/2019 | End date: 7/31/2019 | Category: Select or enter category | Search | Clear | Customer ID 1234567 | Short name ORGABC

Select favorites list | Add to Favorites | Download | Add to Download List

	Start Date	End Date	Category	Name	Version	Format	Company
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Select or enter report name	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Balancing Operating Reserve for Load Response Credit	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Balancing Operating Reserve Generator Credit Details	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	CT Lost Opportunity Cost Forfeiture	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Day-Ahead Operating Reserve for Load Response Credit	Latest	CSV	ORGABC
<input type="checkbox"/>				Report is only available for the <specified> date range. ... for Negative Congestion Summary	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Day-Ahead Operating Reserve Generator Credit Details	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Generator Credit Summary	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Generator Portfolio Credit Summary	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Intraday Offer Schedule Summary	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	JOA Make-Whole Credit Details	Latest	CSV	ORGABC
<input type="checkbox"/>	10/1/2019	10/31/2019	Operating Reserve	Operating Reserve Generator Deviations	Latest	CSV	ORGABC

Specify date range to view reports

Column header filters

Select multiple

Date range errors

Create & organize Favorites

Instant Download / Add to Download List

SUMA compatible



“Shopping Cart”

Download List

Download All

Download all selected reports

Remove individual reports from download list

SUMA Compatible

Category	Name	Dates	Version	Format	Company	Actions
Operating Reserve	Balancing Operating Reserve for Load Response Credit	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Operating Reserve	Day-Ahead Operating Reserve for Negative Congestion Summary	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Operating Reserve	Operating Reserve for Load Response Charge Allocation (Pre FERC 745 (04.01.2012))	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Energy	Emergency Energy Transactions	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Energy Transaction Details	DA Daily Energy Transactions	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Load Response Tier 1 Credits	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Load Response Tier 2 Credits	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Credit Summary	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Obligation Details	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Tier 1 Charge Summary	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Tier 1 Credits	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Tier 2 Charge Summary	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Tier 2 Credits	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	
Synchronized Reserve	Synchronized Reserve Tier 2 Retroactive Penalty Charges	7/1/2019 - 7/31/2019	Latest	CSV	ORGABC	

- Comments
- Suggestions
- Questions

Contact [mss@pjm.com](mailto:mss@pjm.com)