**MarkeTrak Task Force Meeting Notes**

July 13th , 2015

ERCOT Met Center 11am – 3pm

**Attendees**:

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**Via WebEx:**

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Cory Phillips ERCOT

**RMGRR 129 – Customer Rescission Timeline**

RMGRR 129 was remanded back to RMS/MTTF at the May TAC Meeting due to a couple of Competitive Retailers in the market expressing concerns over not being prepared from a resource perspective for the implementation of the condensed timelines. The MTTF added comments to the RMGRR calling for an effective date no later than 10/1/15. ACTION: Lindsay Butterfield will post comments for the August RMS Agenda for approval.

**Inadvertent Training**

The number of overall participants for the IGL training was presented:

Dallas Training 6/12/15 – 30 classroom participants

 31 Web Ex participants

 40 REP segment (representing 19 CRs)

 18 TDSP (all TDSPs)

 3 ERCOT & PUCT

The survey results were also reviewed, with the following comments:

* When asked what participants liked about the training, a recurring theme was the open interactive forum (Q&A) – participants could ask questions with market SMEs available to answer. The live ERCOT demonstration was also found to be beneficial.
* Some ideas discussed to enhance the training and make it more effective:
	+ Provide a brief review quiz after each section to reinforce the key points
	+ More interaction with participants
	+ Review and provide examples on each of the valid/invalid reasons for unexecuting a MT – and review the next steps/options
	+ Streamline some of the “cookbook” training “step-by-step” – example rescission MT
	+ Provide more of the complex “unhappy path” step-by-step examples in detail
	+ Recommend the general overview of IGL on-line training as a prerequisite for the classroom training
* Participants were pleased with the variety of instructors offering the open interactive forum
* Additional alternative suggestions discussed by MTTF:
	+ Training starting earlier than 9:30 and leaving ~ 2 hours at the end of the class for Q&A
	+ Add a ½ day “beginner” training the day before the full training session
	+ Categorize training in sections as beginner, intermediate, and advanced as various sections are reviewed – for example, “cookbook” instructions for the beginner, “unhappy path” for the intermediate learner, and more complex issue for the advanced learner
* ACTION: Sheri to provide summary of training participants and feedback to RMS (via MTTF deck)

**MarkeTrak Serena Upgrade**

Dave Pagliai with ERCOT presented the update on a proposed Serena upgrade. ERCOT had met with the Serena Business Manager to discuss and potentially root cause MarkeTrak’s earlier issue (February 2015) with the premature transitioning of the Inadvertent subtypes. During those discussions, it was noted ERCOT’s version was 5 major /9minor releases *behind* the current version available. Below please find the deck detailing Dave’s meeting with the vendor. Following are highlights of the meeting:

* Upgrades typically occur every 1 – 1 ½ years
* “patch” upgrade would be available
* Latest major release occurred in January 2015
* ERCOT could upgrade to the latest release
* Serena continues to support all past versions
* 5% of Serena users are utilizing same version as ERCOT (2009 R4.03)
* Serena offered presentation of latest version highlighting functionality
* One improved feature of latest version is improved API support, however, would still require custom code on ERCOT’s end

A few questions presented at the June MTTF meeting, answers following:

1. Update on meeting with the vendor – see attached deck
2. Is the system at risk if MT is not updated to latest version? Not at this time
3. What would be the potential impact? None at this time
4. What would an upgrade of the functionality entail? ACTION: Dave will provide materials for distribution to MTTF to review functionality enhancements with the latest version and also confirm if any upgrade fees would be associated.
5. How would it be accomplished ? possibly to coordinate with retail test environment SCR

Based on the information provided by ERCOT, the MTTF felt there was not a sense of urgency in performing an upgrade of the MT tool at this time. It is suggested the current version remain and the proposal be reviewed in 6 – 12 months to determine impact and feasibility (via TDTWG). It was noted, the further ERCOT may plan ahead for any upgrade, the better prepared the market will be. As mentioned above, one suggestion was to align a potential upgrade with the proposed SCR Retail Test Environment to realize any efficiencies in resources and testing.



**Next meeting (if necessary) will be August 24th (WebEx only) from 1 pm – 4pm.**