Following are the minor comments/notes I had documented during the training:

Overall Logistics

* Suggest candy on the tables for next class
* WebEx:  have the presenter as someone other than the host to manage sound
* Send materials to all participants (not just WebEx)
* Have extra training material books on hand
* Have drinks available all day
* Suggest a start time of 9:00 or 9:30

History

* Slide 14 – suggestion on either voice over or slide to differentiate between transmission and distribution (voltage levels)
* Slide 19 – there were some investor owned utilities that did not have to unbundle – examples El Paso, SWEPCO, SPS – slide should be corrected to reflect

Roles

* Slide 51 – should say “created, managed, and maintain ESI IDs” by the TDSP
* Slide 52 – voice over the “10” was a placeholder for the electric industry. It was thought if gas or another utility would utilize this system, their identifiers might start with “20”
* Slide 53 – referring to IAS issues only, should say just “issues”

Rules

* Slide 58 – correct the fonts/labels
* Add a slide for OBDs and Users Guides with screen shot
* Add a slide(s) on which Substantive rules are most applicable to REPs, which to TDSPs – *Jim has taken this as a homework assignment to work with Lindsay on developing*
* Slide 62- should say “market participants”
* Suggested voice over summary PURA -> PUC -> ERCOT  as laws -> rules -> guides

Transactions

* Slide 77 – add “Final”
* Slide 86 – clarify arrows , suggesting green arrows for ‘switch’ and red arrow for ‘MVO’
* It was suggested the transaction exercise might be more effective and interactive if transaction answers were not printed – pros and cons to that
* Slide 91- add “867\_03F”
* Slide 93 – underscore 814\_01

Advance Meters

* Add slide for data collection process after slide 101 – meter (mesh network) > collector > head end  > Meter Data Management System > TDSP Data Systems  > ERCOT & SMT
* Discuss AMS Operational Day vs Business Day
* Slides 116 & 117 – add values to quantify the impact of UFE  - before and after advanced meters – *Bill to research*

Data Extracts

* Slides 149-151 – information seems to be too IT detailed, suggested streamlining to simply slide 149 and refer to “Market Data Transparency” screenshot for detailed reference

Overall concepts

* Add a single slide to describe UFE when first introduced
* Slide 7 – course objectives “Upon completion of this course, you *should* be able to:”
* Additional question for survey – “how did you hear about training?”