**RMTTF Meeting**

Tuesday, August 9, 2016

9:30 AM to 1:30 PM

ERCOT Met Center

Attending:

Debbie McKeever, Oncor

Tomas Fernandez, NRG

Patrick Coon, ERCOT

Jim Lee, AEP

Kathy Scott, CNP

Matt Tschetter, ERCOT

Monica Jones, NRG

Carolyn Reed, CNP

Monsherra Odanga, Oncor

Jennifer Bevill, CES

Sheri Wiegand, TXUE

Ted Hailu, ERCOT

Via WebEX:

Cheryl Franklin, AEP

Diana Rehfeldt, TNMP

Sarah Heselmeyer, ERCOT

Ronda Robinson, Calpine

Ryan Parker, Calpine

Brett Hunsaker, ERCOT

Lindsay Butterfield, ERCOT

**Meeting Notes**

Debbie McKeever read the anti-trust admonition.

Meeting minutes from 6/9 were approved as submitted.

On-line MarkeTrak training modules statistics

LMS revealed over 500 participants, which includes a few Bulk Insert viewings

Features of LMS

* It was noted some of the data may be skewed due to confusion on ‘classification’ of participant. Notably, there are participants with CR emails that have classified themselves under the ‘Other’ category when registering.
* Various solutions were discussed. ERCOT’s ACTION ITEM for next meeting is to pursue the various options with the LMS vendor to determine the most feasible results:
  + Send out market notice to those participants registered as ‘Other’ and open the LMS field for participants to re-classify accordingly. Definitions of an LSE would be provided
  + Change the verbiage on the LSE option to state LSE (Muni, Coop, REP, CR)
* As a long term solution for confusion on LMS registration, the following were suggested:
  + Provide document on “how to register via LMS” as a separate document on the Services>Training page
  + Imbed a PDF document on LMS registration with instructions on how to register for a class
  + Provide an LMS User’s Guide with FAQs on navigating the system
* Certificates to be provided at the end of each module of the MarkeTrak series. Matt demonstrated a similar display on LMS for another series of training. Under the user’s log in, each module will display “run” , “complete”, etc. based on the status of the user’s training. The certificate will only display once the module is “complete”.

Review of Registration for upcoming Houston training

Retail 101 on the 27th 36 class 7 WebEx

MarkeTrak 101 on the 28th 14 class 1 WebEx

* Presenters again need not register
* ACTION ITEM for SHERI: send out a market notice reminding of upcoming training and offering more detail on course content to RMTTF, RMS, TDTMS, AMWG, COPS, TxSET, MCWG list serves

AdMin MarkeTrak On-line Training Module

Comments:

* Mask Matt’s name under Digital Certificate pop-up
* Show the Admin form & resources tab for the Admin application/request
* Add a comment ‘Update User’ does not apply to renewed DCs
* Slow down audio to ‘Update User’
* Slow down audio on ‘Delete User’
* Add a comment that “whenever possible, a replacement for a deleted user should be utilized as this will impact escalation contacts
* For Rolodex example, replace Sarah with company mailbox [support@company.com](mailto:support@company.com)
* Adding a glossary to ALL MT modules \*\*\*

*Added notes for TDTMS – MarkeTrak Upgrade*

* *Require a replacement when deleting a user*
* *When a DC is de-activated and a replacement is selected, universally apply deactivation and replacement throughout MT system*

Retail 101 – finalization of presenters and details for Sept 27th training

A few notes regarding the training…

* No anti trust is needed at the beginning of the deck
* ERCOT will print necessary books
* Remove/ modify slide 4 on “Additional Training Available” – remove Retail 101
* Presenters
  + 1 – History – Brett & Eileen
  + 2 – Roles – Brett & Tomas
  + 3 – Rules – Jim & Lindsay
  + 4 – Transactions – Sarah & Brett
  + 5 – AMS – Jim & Sheri
  + 6 – Data – Brett & Debbie
  + Wrap & Game - Brett
* Matt will send the latest deck to presenters within the next day or so – ACTION ITEM: Presenters are to review their section and provide any updates back to Matt by September 1st. These will be reviewed at the September RMTTF meeting on 9/8/16. NOTE: Revisions are for intended for *incorrect information* only.

MarkeTrak 101 – finalization of presenters and details for Sept 28th training

Below are proposed agenda changes and presenters:

**MarkeTrak Training 101 – Agenda**

1. What is MarkeTrak? DEBBIE
   1. recap from Retail 101-
   2. suggest on line MarkeTrak modules
   3. Difference between DEV & D2D –high level
2. General MarkeTrak Navigation – Sarah/ERCOT
   1. personalizing dashboard- more quick tips
3. Email Notifications ERCOT/Sarah
4. Listserves ERCOT/Sarah
5. Administration Workflows ERCOT/David Hanks
6. Bulk Inserts MONICA
7. Quick Reference Subtypes Carolyn
   1. Carolyn’s sheet - provide handout
8. Day to Day Subtypes
   1. Usage & Billing –Sheri
      1. All subtypes – Usage & Billing , AMS LSE
   2. Switch holds – Jim
   3. Inadvertent Gains- Tomas
      1. Rescission

**Lunch**

* 1. Cancel w/Approval – Oncor/Marty
     1. current timelines
     2. proposed changes
  2. Other - Monica
  3. Missing Transactions – Monica
  4. Service Address- Monica/Tomas
  5. Premise Type- Monica/Tomas
  6. Projects –Monica/Tomas
  7. Market Rule Sheri
  8. Rep of Record - Sheri
  9. Siebel change - Sheri
  10. 997 issues - Sheri
  11. ­­Service Order 650 – Sheri
  12. Safety Net order - Jim
  13. Move Out with Meter Removal – Jim

1. Data Extract Variances (DEVs) Carolyn
   1. higher level
   2. more common DEVs
2. Reporting ERCOT/David Hanks
   1. Background Reports (ERCOT/David Hanks)
   2. DEMO

For the DEMO, Sarah reported David was preparing some canned demos/reporting presentations. ERCOT would also “take requests” from the room on suggestions for demo examples. SMEs in the room may assist in the demonstration.

* Matt will send the latest deck to presenters within the next day or so – ACTION ITEM: Presenters are to review their section and provide any updates back to Matt by September 1st. These will be reviewed at the September RMTTF meeting on 9/8/16. NOTE: Revisions are for intended for *incorrect information* only and suggested revisions based on feedback from TDTMS
* Feedback from TDTMS data review:
  + Revisions to the User’s Guide regarding use of AMS LSE Dispute category – “Other” subtype was listed to be used when 867s did not match sum of the interval data
  + Usage & Billing – Dispute – reasons for unexecuting – time stamps vs invalid dates
  + In general when ‘unexecuted’ or ‘complete’ is selected –
    - Unexecuted means no action was taken
    - Complete means action was taken
  + Missing Enrollment TXN – wait to allow the market to “work”
  + Close vs Auto-complete – in general , advise users to close out and complete MTs as opposed to allowing the ‘auto-complete’ feature to execute – allows for a more accurate view of data
  + Cancel w/ approval changes and the upcoming RMGRR
  + Switch Holds – review data prior to submitting – have seen MTs submitted where there is no SH pending, or CR is not the ROR, documentation is invalid/incomplete
  + In general, discuss MT system enhancements following system upgrade – brainstorming ideas or improvement – introduce Jim and Monica as TDTMS Chairs – have Issue Tracking forms available for submission

Training Schedule for 2016-2017

* TF discussed proposed training for 2017 with the support of ERCOT
* Retail 101 Training next year proposed to align with Flight Testing – February, June, and October
* Since MT 101 was not offered in **Austin** in 2016, it is proposed to pair the following
  + MT 101 – February 2017
  + Retail 101 – February 2017
* TF felt IGL training is very important and it is suggested to be offered in the Fall and Spring of 2017 – one in Houston and one in Dallas. This can be paired with the Retail 101 offerings associated with flight testing
  + June 2017, Dallas
    - IGL Training & Retail 101
  + October 2017, Houston
    - IGL Training & Retail 101
* With the above suggested training, it was determined IGL nor MT 101 would be offered in Austin in November (as originally proposed)

**GOALS:**

September meeting –

1. review DEV LSE script
2. Review LMS suggested revisions from ERCOT
3. Update on registration for September Houston training
4. Review any modifications to Retail 101 deck
5. Review any modifications to MarkeTrak 101 deck
6. Confirm Training plan for 2017
7. Status of RMTTF goals for 2016
8. Plan agenda for October meeting

DEV LSE module to market by end of October

DEV Non-LSE module to market by end of November

Meeting Adjourned 1:30