**RMTTF Meeting**

February 2, 2017

9:30 AM

ERCOT Met Center

Room 102

Sheri Wiegand, co-Chair of RMTTF chaired the meeting and read the antitrust statement.

Attending in Person

Carolyn Reed, Centerpoint

Matt Tschetter, ERCOT

Sheri Wiegand, TXU

Kathy Scott, Centerpoint

Tomas Fernandez, NRG

Monica Jones, NRG

Sam Pak, Oncor

Attending via Call

Debbie McKeever, Oncor

Marty Allen, Oncor

Cheryl Franklin, AEP

Diana Rehfeldt, TNMP

Ted Hailu, ERCOT

Tammy Stewart, ERCOT

Mary Sithihao, Stream Energy

Teresa Rodriguez, Stream Energy

Monsherra Blank, Oncor

Corde Nuru, Centerpoint

Synetrick Haynes, Centerpoint

Meeting notes from January 12th meeting were approved as submitted.

**January/February Austin Training – notes/lesssons learned**

Below are the training final counts in attendance:

 Classroom WebEx Support

Retail 101 15 37 12

MarkeTrak 10 17 10

NOTES/LESSONS LEARNED:

* WebEx audio is best through a private WiFi, and discourage public WiFi as the audio “cuts out”
* LMS enhancements/questions
	+ Ensure automated confirmation/reminder email is sent out upon enrollment, 1 week, and 1 day prior to scheduled class- MATT
		- Confirmation email should say “You have registered to attend X in the classroom” or “You have registered to attend X via WebEx only”
	+ TOMAS to develop a set of instructions on how to register for ILT/WebEx class along with some FAQs – can you register for the class the day of? Can you cancel your registration the day of? If I am on the wait list, will I be notified if I am able to attend the class?
* Market Notices about the Training
	+ Ted had suggested all notices regarding the training come from ERCOT in lieu of individual or list serve.
	+ Customized market notices should be sent ~ 6 weeks prior to scheduled class, 30 days, and 1 week and sent to NOTICE Training, RMS, COPS, T
		- Customized message should include instructions and link on how to register for the class and comments stating ‘wait list will be accepted’, ‘you will receive a confirmation email once you have registered for the class’, ‘if you do not receive a confirmation email upon registration, please contact ERCOT Training at training@ercot.com’, ‘lunch will be provided’
		- SHERI to draft market notice email for upcoming training to review at the next meeting

REVIEW OF FEEDBACK SURVEYS

* Comments were consistent with previous sessions – materials good, Q & A valuable, instructors are knowledgeable – very positive
* Continue to experience difficulty with WebEx audio – cannot hear questions/comments from the room or poor sound quality
* Ted had suggested possibly in 2018 to conduct a WebEx only training where sound is controlled – this idea was well received and noted this may be best suited for an Austin training
* For MarkeTrak training, consider conducting the DEMO as needed and not wait until the end of the day – having the flexibility to switch over to the CERT environment
* MKTRK training feedback – no one said the class was “too long” and one commented “too short” WOO HOO!!

REVISITED THE TXSET CARDS

Thanks to Sam for pointing out the cards did not align with the “Transaction Name Inventory” under TXSET Information. Particularly, 814\_09 and 814\_13 needed to be flipped with ERCOT-CR and 814\_18 and 814\_19 should reflect the Muni/Coop reference. DIANA will confer with Kathryn Thurmon and ensure corrections are made on ercot.com.

UPCOMING MAY TRAINING

MATT will ensure the WebEx portions for the Retail 101 and IAS Training are added to the schedule of classes in LMS.

**MarkeTrak On-Line Training Modules**

Statistics were presented for users – to date, there are a total of 597 on line users. The 14 new users from last report were for DEV modules.

EMAIL/NOTIFICATION MODULE

Matt presented the revisions from the previous meeting. Only one additional revision was noted:

* For managing the Rolodex, the following verbiage will be added and the screenshots will be slowed down: “ Here are the steps to update email addresses” “Then press update to complete the email change”
* The checkpoint question will be changed to “Failed Analysis”
* MATT will check with Kim on recording the additional verbiage, complete the changes, and check with TED on the market notice launching the new on-line module by the EOW (2/3/17)

REPORTING MODULE OUTLINE

Tammy presented a suggested outline. The Background Reports and GUI Reporting will be combined for one final module on the reporting functionality.

* Basic navigation – upgraded MT will have a different look
* Search for background reports by name/user
	+ Add report parameters to existing report to extract queried information
	+ Reference ‘Background Report Output Columns’
* Contact and Rolodex reports
* Create new report – promoting the ‘HELP’ functionality and how to create the following report types
	+ List
	+ Distribution
	+ Duration
	+ Trend
	+ Other
* Demo will be provided for ‘list’ report –
	+ walking through creation
	+ filter the data wanted
	+ walk through the report tabs
	+ calling out the advanced functions – ‘and/or’
	+ sorting options – highlighting primary and secondary
	+ additional options tab with calculated functions
* Noting if a report is desired and having difficulty creating, a MT ‘Other’ subtype can be created and send to ERCOT for assistance
* How to save a report- the differences and who is able to view, saving to your favorites, exporting to excel
* User profile settings – scheduling a report / how to schedule / xcel or pdf format
* MONICA will develop the checkpoint questions
* Schedule for release:
	+ March 6th the upgraded MT will be available in the CERT environment
	+ Script - April meeting to review
	+ Module - June meeting to review
	+ Rollout – July meeting

**IAG Review**

ERCOT (MATT) will be responsible for compiling revised slides and “re-skinning” the IAG deck. The Anti-trust Admonition will also be updated to reflect the latest version. The following assignments were made for reviewing/revising the deck:



It was suggested participants and presenters introduce themselves at the beginning of the training. Presenters will bio themselves at the beginning of their section.

DEMO should include creation of an Inadvertent Loss MT from end to end.

Other topics to include:

* what is required by TDSP for BDMVIs
* discuss DOL and DOL + 1
* how to manage reporting
* switch holds

SCHEDULE

FEB 15th- Tomas and Sheri to exchange slides

FEB 22nd – all revised slides should be sent to Matt to compile

FEB 28th – initial draft of the deck will be ready

MAR 2nd – RMTTF meeting review flow and content of revised slides

MAR 15th – revisions from 3/2 mtg are due to Matt

MAR 27th – revised deck from Matt will be available for presenters

APR 4th – Dry Run for presenters at RMTTF mtg held at Oncor in Dallas

APR 7th – Final revisions are due to Matt

APR 14th – revised deck will be available from Matt

APR 21st – final approval of deck due to Matt

APR 24th – deck goes to print for training

MAY 4th – IAG training in Dallas at Oncor offices

MARKET NOTICES FOR MAY TRAINING

Special Market Notice for May training to be sent out March 20th

Second notice on April 3rd (30 day) promoting training

Final market notice on April 24th (1week) promoting training

**Agenda for 3/2 RMTTF Meeting**

1. Review of Special Market Notice specifically for Retail 101 & IAG Training
2. LMS Report from Matt
3. MarkeTrak on line statistics
4. Firm up presenters for Retail 101 & IAG training in May
5. Review of IAG deck