**RMTTF Meeting**

June 8, 2017

9:30 AM

ERCOT Met Center – Room 102

Debbie McKeever, co-Chair of RMTTF chaired the meeting and read the antitrust statement.

Attending in Person

Debbie McKeever, Oncor

Carolyn Reed, Centerpoint

Sheri Wiegand, TXU

Kathy Scott, Centerpoint

Tomas Fernandez, NRG

Jim Lee, AEP

Jeff Chen, Centerpoint

Attending via Call

Diana Rehfeldt, TNMP

Matt Tschetter, ERCOT

Ted Hailu, ERCOT

Cheryl Franklin, AEP

Tammy Stewart, ERCOT

Monica Jones, NRG

Meeting notes from April 6th were approved. Action Items were reviewed and discussed:

* Ted will prepare for the August 3rd meeting an updated LMS registration process that will be incorporated into the Training market notices either via content or link

ANNOUNCEMENT: Ted Hailu announced a new Market Training Manager has been assigned, Mr Art Deller. He will be in attendance at the next RMTTF meeting, August 3rd

**LMS Stats – MarkeTrak On-line Modules**

Ted provided the latest statistics for LMS MT on line users –reports indicate 663 total users, which is up from the last report of 631 users at the beginning of April. YTD users are 79.

ACTION ITEM: Ted will provide the detailed reports to Sheri for further breakdown in the update to RMS.

**Retail 101 & IGL Training**

ACTION ITEM: Presenters from past trainings are to send Matt an email with all the training sessions attended and he will “credit” the presenters for taking the classes with LMS.

SURVEY RESULTS:

**RETAIL 101**

18 respondents

* Feedback is consistent with other training sessions – like the interactive format, market participants presenting are knowledgeable, and materials are very helpful.
* Only opportunities presented are with WebEx audio – not being able to hear the interactions in the room. RMTTF is considering WebEx only training. RMTTF will review the 2018 Training Plan in October where following will be further discussed:
  + ILT vs WebEx only
  + Tailoring slides for WebEx only presentations
  + Dallas and Houston locations possibly F2F only
* Color copies for certain slides such as listed below will be reviewed in August
  + Relationship room
  + Transactional dots
  + AMS Data Flow – big picture

**IAG**

23 respondents

* Equal mix of knowledge level in class – Beginner/Intermediate/Advanced
* Consistent positive feedback as above as well as opportunities
* Participants were interested in Switch Hold Training. Some ideas discussed were a “mini-training” at the end of either IAG Training or a future RMTTF meeting when all the resources would be available. Also discussed including a tips & tricks sheet on processing Switch holds that might be embedded in the on line module for future reference. TDUs may already have such a document available for review.

**Retail 101 & IAG Training- Training Materials**

All suggested revisions were noted from Dallas training. ACTION ITEM: Matt will modify the decks accordingly.

**MarkeTrak On Line Training – Reporting Module**

The task force reviewed the Reporting build. Below are the suggested revisions.

* Browse Application Report – pop -up on what Kim states and slow down the audio – bullet the script
* Browse Built-In Reports- provide a pop -up for “all items” and “all items/primary user” statements
* Contact list – add comment and reference to Admin link on managing Rolodex
* Add fancy red arrow on ‘Reporting’ for SBM User Workspace page
* Slow down the Distribution Report highlight
* Highlight the tabs as we move forward in Custom Distribution Reports
* Highlight some of the report types on SBM on the left- hand side screen shot when scrolling down displaying report type
* When creating a report, add the reminder red arrow on the ‘reports’ button
* Highlight ‘Joins’ button and put an arrow on Creating Listing Report
* Slow down the subtype insert on creating the report
* On slide 3 of 8 for creating a report, add the sentence at the end of the script with a pop-up “*Values reflect real-time results at the time the report is run”*
* Add green box around sorting tab on sorting option
* Show drop down “calculated field” and add pop -up on how “Time in State” is the calculated field
* Highlight date/time keywords and selection of ‘Now’
* Work with Tammy on rewording script for the sorting tab
* Add pop -up noting only Admins are able to make a report viewable to all
* Background Reports – actually show the listing of the Background Reports after it is shown were to find it on ercot.com
* Add pop -up on archived information similar to earlier in the training
* Add pop -up noting “when the report has completed….”
* Add the last sentence of the script to the next line on the Conclusion
* Add audio to the checkpoint question
* Add ‘(Active)’ after Live on the checkpoint question – add screen shot on ‘Data to Return’
* Volume is low on the last slide

ACTION ITEM: Matt notes the revisions will be completed and provided to the RMTTF Co-Chairs by June 26th. A WebEx might be called to review the revisions. The goal is for an end of June launch to the market.

**RETAIL 101 & IAG Training in Houston**

Kathy noted ercot.com did not list the room number and asked Ted to add Room 1360 or 13th floor to the address.

Matt reported the following have already registered:

ILT WebEx

Retail 101 7 4

IAG 11 2

**Preliminary RMTTF Plans for second half of 2017**

Vision is to move to “maintenance mode” to ensure the MarkeTrak modules are still accurate and updated considering the MarkeTrak “face lift” and any other revisions. It was decided the modules completed less than a year ago did not need to be reviewed. (Bulk Inserts and forward)

The TF will begin looking at a training plan for 2018 in October and review topics for consideration with TxSET Transactions at the top of the list. Other topics suggested were Digital Certificates (which Ted clarified covers a broad ERCOT audience and ERCOT staff is planning the training) and the Retail Sandbox Environment.

August:

* Review presenters for Sept training in Houston
* Select color slides for Retail training
* Review *MarkeTrak Overview* & *Cancel w/Approval* modules
  + Ensure Cancel w/Approval will align with NPRR 778/RMGRR139 revisions set for a Fall implementation

September

* Finalize *MarkeTrak Overview* module
* Continue review of *Cancel w/Approval* module
* Review of *Switch Hold* module – earlier consideration of ‘tips and tricks’ insert

October

* Finalize *Cancel w/Approval* module
* Continued review of *Switch Hold* module
* Discuss 2017 accomplishments/ 2018 goals- Training Plan
* Review survey results from Sept training
* Begin review of *Usage & Billing* module

November

* Finalize review of *Switch Hold* module
* Finalize review of *Usage & Billing* module
* Begin review of *Inadvertent Gains* module
* Discussion of TxSET training

December

* Finalize review of *Inadvertent Gains* module
* Begin review of *Day to Day* module
* Continued discussion of TxSET training

The above agenda plan is high level and subject to change. The meeting adjourned @ 1:30 pm.