RMTTF MEETING NOTES

December 7, 2017

9:30 AM

ERCOT MET CENTER

Attending

Sheri Wiegand TXU

Debbie McKeever Oncor

Art Deller ERCOT

Jim Lee AEP

Carolyn Reed Centerpoint

Tomas Fernandez NRG

Ted Hailu ERCOT

Matt Tschetter ERCOT

Diana Rehfeldt TNMP – CALL IN

Chris Conley Golden Spread Electric

Sheri facilitated the meeting.

Training on November 28, 29:

Retail 101

All positive comments from the survey responses.

Stats on LMS = 759 overall.

TX SET Module discussion

What is it?

We will do a web-based class and determine what is needed with regard to Instructor led.

We have followed two different models.

Retail 101 – what does ERCOT use for a retail market training model?

Art and Ted stressed how busy ERCOT training is and that May could be too soon to roll out a TX SET Module. Everyone said they understood and that we would make progress based on availability of ERCOT staff and proceed from there.

Future Training:

Web-ex only

January 30, 31 – presenters could be at ERCOT together to minimize risk of gaps.

* 1-30 Retail 101
* 1-31 Inadvertent Gain

Dallas Instructor Led and Web-ex

Hosted by Oncor

* May 1 - Retail 101
* May 2 – TX SET Overview (if complete, otherwise could be IAG)

Houston Instructor led and web-ex

Hosted by Centerpoint

* September 25 – Retail 101
* September 26 – TX SET Overview

Changes to Modules: reviewed with Matt Tschetter.

Matt to make changes and note to co-Chairs.

**Notes from TxSET development**

*PROBLEM STATEMENT: overall understanding of TxSET and the retail market processes driving the transactions-*

*TARGET AUDIENCE: retail market participants who have a basic knowledge of EDI looking for an overall understanding of the TxSET –*

*– CRs, TDSPs, ABCs, PUC Staff, Service Providers*

*COURSE OBJECTIVES: (Not Complete will add once in development)*

* *General understanding of retail market processes*

*COURSE OUTLINE:*

*Introduction: (Use Retail 101 TxSET slides as a starting point)*

* What is TxSET?
* Why do we have TxSET?
* How is TxSET executed?
	+ NAESB protocal (to briefly explain)
* When are TxSET used?
* TxSET Working Group (Match Scope on ERCOT.com)

*Understanding retail market processes – MVI, MVO, SWITCH, Service orders*

* *how tariffs drive field execution timing*
* *how protocols drive transaction timing*

*Where do I find information about them? (in addition job aid/cheat sheet)*

* *ERCOT MIS Portal – Find Transaction*
* *Section 7 RMG*
* *TxSET Implementation Guides*
* *Transaction Timing Matrix, RMG Appendix D1*
* *TxSET Swim lanes*
* *NP Chapter 15- customer registration*
* *NP Chapter 19 – TxSET*
* *NP Chapter 24 – Retail Point to Point communications*
* *RMG Appendix D3 – TDSP Discretionary Service Timeline Matrix*

*What are they? 867s, 814s, 810s, 650s , T series
How do they flow?*

* *How to read Swim lanes*
* *Understanding transaction timing*
* *Explain stacking logic (RMG Section 11) – validations by ERCOT, TDSPs*

MIS/Portal (Monica/Carolyn)

* Review
* Demo

*Change Management*

* *TxSET Working Group*
* *Change Controls*
* *Issues*
* *Texas Market Test Plan*
* *Flight Testing*

*Deciphering Implementation Guides – line segments, format
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Introduction: (Use Retail 101 TxSET slides as a starting point)*

* What is TxSET?
* Why do we have TxSET?
* How is TxSET executed?
	+ NAESB protocal (to briefly explain)
* When are TxSET used?
* TxSET Working Group (Match Scope on ERCOT.com)

*Tools/References:*

* ERCOT Protocols (Ch. 15, 19, 24)
	+ Overview
* Retail Market Guide
	+ Overview
	+ Section 7 Market Processes
	+ Transaction Timing Matrix (Section 9 Appendix D1)
	+ Stacking Logic (Section 11 of the RMG)
* TxSET Webpage
	+ Overview
	+ Swimlanes
	+ EDI Guidelines
	+ Testing
* Any other relevant information

**Transactions: (Transaction Names Inventory V4 .0 Card handout)**

* Groupings *(May be able to utilize some of what was in Retail 101)*
	+ 814’s
	+ 810’s
	+ 820’s
	+ 867’s
	+ 650’s
	+ 824’s
	+ 997’s
	+ T Series
* Interaction Assignment SWIM LANES
* Stacking Logic
* EDI Transaction
	+ Example (Happy Path/UnHpappy Path of MVI)
	+ Walkthrough of Examples of EDI transactions from implementation guides.
* MIS/Portal
	+ Review
	+ Demo
* TxSET Working Group
	+ What is it
	+ How it works
	+ Change Controls
	+ Any other Information

Conclusion: