RMTTF Meeting

Thursday, July 21, 2016

9:30 AM to 3:00 PM

ERCOT Met Center

Attending:

Tomas Fernandez, NRG

Patrick Coon, ERCOT

Jim Lee, AEP

Kyle Patrick, NRG

Lindsay Butterfield, ERCOT

Kathy Scott, CNP

Matt Tschetter, ERCOT

Monica Jones, NRG

Carolyn Reed, CNP

Monsherra Odanga, Oncor

Via WebEX:

Sheri Wiegand, TXU

Debbie McKeever, Oncor

Marty Allen, Oncor

Cheryl Franklin, AEP

Lucy Alcala, Summer Energy

Sarah Heselmeyer, ERCOT

**Meeting Notes**

Tomas Fernandez read the anti-trust admonition.

Meeting minutes from 6/9 were approved as submitted.

#s for upcoming training

Retail 101 on the 27th 27 class 4 WebEx

MarkeTrak 101 on the 28th 10 class 1 WebEx

* Presenters need not register
* Training will be promoted at upcoming COPS, TAC, RMS, and AEP Workshop
* Kathy provided hotel information for presenters

On-line MarkeTrak training modules statistics

LMS revealed 492 participants, which is up by ~ 100 viewers

30-40 are attributed to the D2D launch

Upcoming Training

Some suggestions from last MT 101 training:

* consider shortening the ERCOT demo section to an hour
* moving the demo up in the agenda
* after reviewing previous agenda might make sense to move ahead of ERCOT Admin Workflows/Reporting/Email notifications
* ACTION ITEM: Finalize agenda at next RMTTF meeting on 8/9. ERCOT suggested ‘canned’ demos for this section. Will have suggested format a the next RMTTF meeting for review

Those in attendance agreed to have the Inadvertent Training in lieu of the earlier proposed MT 101 in Austin scheduled for November 7th or 8th.

With 8 modules nearly complete by the November time frame, it may not be necessary to hold another MT 101 in Austin.

Remaining modules include:

* Background
* DEVs
* Email notification
* Reporting

Room 206 reserved for November 8th and we will decide at the August meeting whether or not we will have Inadvertent Training.

Bulk Insert Training Module

Comments:

* Template should be in the resources – done
* Slow down transition – Matt to do
* Tips and Tricks will be added to resources by Matt
* Delete header rows – Matt
* Include how to save as a CSV file
* Matt commented for the testing he had to use Internet Explorer instead of Google Chrome.
* Include what “scientific notation” looks like.
* On Tip #4 include excel screenshots
* Checkpoint questions – second question add “two responses”

Matt will send out Bulk Insert to leadership early next week, Tuesday, July 26th with the goal of launch on Monday, August 1st to the market..

Marketrak Administrator Functionality

Comments:

* Matt to add highlighting boxes.
* Matt to add that when looking at the dig cert, the admin must enter the employee ID exactly as shown on the list of dig cert drop down.
* Changed user name from M Jonathan to Mary J
* Admin Reporting
* Matt stated that Tammy really liked the script.
* Language for Contact categories to be added, this will include…”for every subtype there are contact categories”

Matt to make all changes to the script and will be reviewed at the next RMTTF meeting.

Next meeting preliminary agenda for August 9th

1. Review and finalize Admin module
2. We will determine if IAG training is being done and if so when.
3. We will also go through the itinerary and agendas for the September training, especially MT 101 and ERCOT demos
4. Review DEV LSE draft script

**GOALS:**

October meeting – review DEV non-LSE script

Review draft module for DEV LSE

DEV LSE module to market by end of October

DEV Non-LSE module to market by end of November

Meeting Adjourned 11:45