MEETING MINUTES
PJM Interconnection
eSchedules Member Focus group
PJM Conference and Training center/ WebEx
Tuesday May 8, 2012
9AM to 12 noon

Members Present:

LAST NAME	FIRST NAME	COMPANY
McCloud	Jeff	PSE&G
Punjabi	Gautam	PJM Interconnection
Lefkof	Bud	PJM Interconnection
Lassiter	Mark	PJM Interconnection
Fernandez	Ray	PJM Interconnection
Wolfe	Dave	PJM Interconnection
Dhuri	Bhushan	PJM Interconnection
McComb	John	PJM Interconnection
Bassett	Jeffrey	BP Energy Company
Bisti	Joe	PECO Energy Company
Blume	Craig	UGI Energy Services, Inc.
Borrero	Maria	PECO Energy Company
Fabiano	Janell	PJM Interconnection
Greening	Michele	PPL EnergyPlus, L.L.C.
James	Denise	Dominion Energy Marketing, Inc.
Kliwinski	Diane	Duquesne Light Company
Maas	Rebecca	Dominion Retail, Inc. (MetEd)
Martinez	Eddie	Dominion Energy Marketing, Inc.
Meridionale	Kevin	Jersey Central Power and Light Company
Norton	Chris	American Municipal Power, Inc.
Obergfell	Joe	Appalachian Power Company (AEP Generation)
Rainey	John	Northern Virginia Electric Cooperative (NOVEC)
Sassaman	Teresa	PPL EnergyPlus, L.L.C.
Tew	Linda	Virginia Electric & Power Company
Kotras	Craig	PGE
Hopkins	Sandra	Dominion
Makohin	Nazar	
Rutledge	Michelle	

	Andrew	AMP
Hearns	Debbie	
Jennings	Ken	
Dessender	Harry	PJM Interconnection
Willman	Jerry	
Burnett	Lisa	
Madjeski	Ray	
Greening?	Michelle	
Meridionale?	Kevin	
McElligott?	Liam	PJM Interconnection
Ernst	Donna	
	Terri	

1. Administration

An overview of what is being developed was provided and why. The demonstration of the application begins with the Dashboard

2. Review the new system and obtain feedback

- Question (Q) – Login goes directly to Contracts, can it go to Schedules instead of contracts?

- Answer (A) - Schedules has not been developed yet, Yes we were going to show all pending schedules by default on the pending tab – would you want the Schedules tab to be the default. Make it an optional to default to Schedules.

- Q: Is Name the status of the contract? A: No that is the name of the contract, non-unique id. The names in the test data do reflect the status but it is just a test name. Q: Can only sort by status? A: No. Bud is showing the filtering and sorting by any column. Q: Is there a way to not show expired ones or Pending for 90 days goes to Expired Status Still an open issue.

- Q: Is there a way to sort showing pending only or confirmed only? Click Pending Only. Q: Doesn't matter if Buyer or Seller? A: Correct.

- Q: Can date range go back in history or forward only? A: Yes past history is available. You can show them, the expired ones will be in red.

- Q: Will contracts ever be deleted? A: according to John McComb – in 13 years none has ever been deleted

- Q: can we filter out expired contracts and save it as a default view? A: The default is to not show expired contracts which have ended more than two weeks ago. Pending contracts will always show in yellow if they have not reached their stop date.

- Q: Can the name link be a phone number or email link? A: Yes it could be (additional discussion after the call on the legal and privacy concerns with providing this information)

- Q: Will this capture the history only from implementation forward? A: Yes.

- Q: Unable to upload zeros in the hours, uploading for company and there are no zeros, keep getting calls about it. A: Will just discard the zeros value initial uploads/contracts in the future.

- Q: Schedule had wrong values and want to zero them out can you upload then? A: Yes, you would be able to do that.

- Today the current system sends error messages on initial load (but has a poor error message) and does allow upload of zeros on existing contract to update values to zero. We will continue this behavior.

- Q: Does this affect eSchedules browserless interface. A: We will have to provide a new browserless client. We have an existing application the works, would the application have to change to accommodate a new format? Q: Is the format going to change? A: No change is required; we are using the same format as before. There is a command line client which assists with the login (the browserless client) which enables the upload of files without logging into the UI. There will be another session for CAM, how security is changing etc? Will there be sufficient notification so that third-party providers such as VinTech? Will have time to accommodate the changes? They have a vendor application. A: yes it will be in Training for as long as needed to allow users to prepare for the new release. The changes will be made with plenty of notice. Could be in Training for a couple of months or longer. Planned production date will be made available well in advance.

- Q: Is Training rollout scheduled yet? A: No not yet

- Q: Assuming Separate session for CAM and browserless clients etc. will there be changes to any other applications? A: Yes, all the applications will be expected to be rewritten in a similar framework and the interactions with member users will be similar.

- Q: Access related questions – either full read write or reports only – will there be a read only/reports only in the new application. Can you get the data in the new release A: Yes, the read-only role will not allow any functionality other than read only and reports download – read only = reports only. Q: Does the reports only area go away? A: Three reports will be rebuilt in the new system (Loss duration, reconciliation data 60 day lag, company report (all companies, long/short names and org id)). Not sure where the historic billing reports will end up yet.

- Q. Will there be a feature for multiday upload via UI? A. Yes we are planning to do that via extending the Schedule Assistant.

- Q. Will the application have ability to save my personal viewing preference, like I want to see only confirmed contracts when I open the app or if I want to see only pending schedules when I open the app. A. That’s a good feedback; we will take that as a good suggestion.

3. Closing remarks

The team took notes and is going to update the system based on some feedback. Upon completion of changes and testing it will be rolled out to training along with information and instructions. Also, going to schedule another session on CAM and browserless. There will be a similar look and feel for all applications.

4. Future Agenda Items

- Review the eSchedules application in its entirety. Review newly developed areas including Schedules and Browserless functions.
- Review areas in the application that have changed due to the feedback obtained from the May 8th meeting.
- Historical reports and retention policy
- Application Training and Production environment schedules
- Communication plan
- User training – Still being determined

5. Future Meeting Dates

June 27, 2012	9AM to 12 noon	PJM Conference and training center or WebEx

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