Agenda

Tech Change Forum
PJM Conference and Training Center
May 20, 2020
1:00 – 3:00 p.m. EPT

Administration (1:00-1:05)

1. Welcome & Ground Rules

   A. Foluso Afelumo, PJM, reviewed the Stakeholder Webex Controls which provides guidance to anyone utilizing PJM's webex meetings.

Follow-up Previous Meeting Review (1:05-1:10)

2. Discuss follow-up items from last meeting.

   A. Foluso Afelumo, PJM, highlighted important upcoming May, June, and July dates for implementations and training/information sessions.

Initiative Roadmap Updates (1:10-1:25)

3. Roadmaps for PJM initiatives through 2020 will be presented

   A. Ilyana Dropkin, PJM, reviewed the roadmap for the new Competitive Planning tool that will be available in the production environment tentatively on July 1. Ilyana explained that this new tool will replace the current process where proposals are prepared using an excel proposal template and then sent to PJM via Secure. The new process, an implementation for FERC Order 1000, would utilize a web based application.

Product Roadmap Updates (1:25-2:30)

4. Roadmaps for individual products will be presented

   A. Gerry McNamee, PJM, reviewed the roadmap for DR Hub, Power Meter, InSchedule, Billing Line Item Transfer and eSuite Home Page. Gerry explained that the DR Hub release for train that was scheduled for May 7, is rescheduled to May 19 due the need to coordinate with a Markets Gateway release. Gerry also explained that the DR Hub production release that was scheduled for May 21, is rescheduled to May 28 due the need to coordinate with a Markets Gateway release. Gerry stated that an eSuite release containing a number of changes for train had to be rolled back due to issues accessing MSRS after the release on April 30.

   B. Carla Thew, PJM, reviewed the MSRS roadmap. Carla explained that PJM was enhancing the MSRS User Interface (UI) so that its look and feel is consistent with the rest of PJM's refreshed tools and that the refreshed tool was currently in development. Carla explained that there would be a follow up communication issued on when MSRS would be part of the PJM two factor authentication implementation for the browserless API. Carla communicated that stakeholders would need to take action when the PKI and UI changes were placed in train in December 2020.

   C. Kim Warshel, PJM, reviewed the Markets Gateway roadmap. Kim explained that the Markets Gateway Specification Guide updates for the Offer Verification Exception enhancement implementation was changed to June 2 and the dual fuel validation update was changed to June 16 to allow stakeholders additional time to prepare. The Offer Verification Enhancement was implemented to comply with FERC Order 831.

   D. Tawnya Luna, PJM, reviewed the roadmap for PJM.com and communicated the RTEP Upgrades & Status Section retirement date was postponed to June 30. Tawnya explained that if anyone receives a notice that their Secure Area access was expiring, they should click on the Renew button on the secure area page and that by June 30, any users who have bookmarked pages in the RTEP Upgrades & Status section or who pull data via XML from those

pages should update any systems that utilize the existing XML file. Tawnya explained that any users who scrape the Operational Data and Dispatch Rates pages should update their systems to pull this data from Data Miner by July 31. Tawnya communicated that phase 2 of the home page redesign that incorporates Single Sign On (SSO) was rescheduled to September 2020 and that PJM is seeking feedback at TechChangeForum@pjm.com on any changes discussed. Tawnya stated that PJM will continue to send monthly communications for the Operational Data and Dispatch Rates pages retiring on July 31.

E.   Vy Le, PJM, reviewed the eDART roadmap and provided information on the completed releases. Vy reviewed the May 19 maintenance that was rescheduled until May 28 and the August 2020 train and production releases. Vy requested that stakeholders who are interested in utilizing the Company Distributed Workflow (CDW) should send an email to TechChangeForum@pjm.com. Vy reviewed the eDART account requests and cleanup efforts PJM was making which included outreach to member CAMs for the Account Manager migration of accounts. The migration of eDART accounts into Account Manager is a mandatory PJM security requirement.

F.   Swapna Kanury, PJM, reviewed the Data Miner roadmap. Swapna explained Data Miner 2 is now referred to as Data Miner and communicated that there will be Data Miner releases on May 28, June 25 and June 26 for which communications will be sent.

G.   Heather Bird, PJM, reviewed the PJM Connect roadmap and explained that connect.pjm.com was now referred to as PJM Connect. Heather communicated that the May 24 upgrade to PJM Connect to implement PJM Single Sign-On (SSO) was rescheduled to July 9 to allow for additional security testing. Heather reminded stakeholders of the recorded education session available for review.

H.   Sandy Honore, PJM, reviewed the Networks roadmap and explained that June 4 network change would have no impact on participants.

I.   Sunil Rachakonda, PJM, reviewed the Tools Security roadmap and explained that the May 5 implementation for Single Sign On (SSO) login URL was rescheduled to May 21. Sunil said that this change will affect all users of SSO tools and any Single Sign On (SSO) bookmarks that have been saved will need to be removed. These include all of the PJM tools with the exception of eGADS and eDART. Sunil reviewed the Q3 2020 impacts to ExSchedule, OASIS, and Account Manager. Sunil explained the PJM initiative to implement public key infrastructure (PKI) authentication on ExSchedule and OASIS to comply with the FERC order issued on February 4 and that stakeholders should obtain a certificate from an authorized vendor. Sunil explained that users would need to use Account Manager to associate valid PKI certificates with user accounts. Sunil explained that PJM intends to make PKI available to secure the browserless application program interface (API) for all PJM tools in the future and suggested that stakeholders review the FAQs that PJM has posted about PKI Certificates and Two-Step Verification for Browserless/API.

J.   Bhavana Gagrani, PJM, reviewed the Account Manager, Bulletin Board, Data Viewer, eDataFeed, Messages, Tools Home and Voting roadmap and discussed the May 27 tools home page change would now occur on June 3. Bhavana explained that for security reasons, PJM is requiring that all accounts have a whitelist entry in Account Manager by June 30 and that all CAMs will start seeing this information in May and suggested that CAMs review the information on how to utilize the whitelist feature. Bhavana asked stakeholders to update any current bookmarks and links for the Tools Home Page to https://tools.pjm.com to maintain compatibility with PJM's Single Sign On (SSO) login.

K.   Ian Mundell, PJM, reviewed the eGADS roadmap explaining the fact that the April 28 train and production releases were rescheduled to May 12. This rescheduling was due to a defect and requirement change from NERC.

L.   Theresa Esterly, PJM, reviewed the Capacity Exchange roadmap to explain the Non-Retail Behind The Meter Generation (NRBTMG) enhancements being planned for June. This enhancement will affect LSEs and EDCs that are responsible for reporting NRBTMG located in modeled wholesale areas in zones. PJM is adding new Non-retail Behind The Meter Generation (NRBTMG) functionality in Capacity Exchange to help administer the requirements of NRBTMG in Manual 14D, Appendix A. This functionality will **replace existing processes** that involve stakeholders

manually completing and submitting NRBTMG templates to BTMG@pjm.com. The window to report and confirm NRBTMG unit data will open on June 15.

M.   Foluso Afelumo, PJM, reviewed the tools and applications that had no changes from last month.

General Updates (2:30-2:50)

5.   General updates will be presented

A.   Roger Cao, PJM, reviewed the 2020 Variable Operations of Maintenance (VOM) changes that will be implemented on June 15 and recapped the April 21 information session. Roger explained that the session was recorded and provided login instructions to PJM Connect. Roger reminded stakeholders that June 15 is the deadline for templates to be submitted and provided a summary of the 2019 and 2020 changes to review standards.

B.   Zhenyu Fan, PJM, provided an update on the Posted Contingency List and explained the current Contingency List HTM format will be retired on September 6, 2020. This retirement will affect vendors and participants who have developed software that consume this data.

C.   Vijay Shah, PJM, provided an update on PJM's Offer Verification Exception Enhancement process that will become effective on June 2, 2020. Vijay reviewed Markets Gateway changes that would eliminate the current process of stakeholders submitting excel spreadsheets and provided reference materials for additional stakeholder assistance.

D.   Foluso Afelumo, PJM, provided general updates and reviewed the feedback PJM received from the 2019 Stakeholder Satisfaction Survey that involved PJM tools and applications. Foluso stated that based on feedback received, PJM wanted to enhance the Tech Change Forum meetings to start providing short monthly demonstrations beginning with the May meeting. The BLIT demo that did not occur during May meeting will occur at the June meeting along with potential demos for Capacity Exchange, Data Miner, and Markets Gateway. Foluso provided an update on the May 5 FTR Center production where the credit screen displayed incorrect values.

Product Design Review & Feature Demonstrations (2:50-2:55)

6.   Demo

A.   Jessica Crown, PJM, provided a demo of the Account Manager SUMA and Whitelisting features. This demo will be recorded and posted.

B.   Nicholas Disciullo, PJM, will provide the Billing Line Item Transfer (BLIT) demo at the June 16 Tech Change Forum.

General Feedback and Future Forum Topics (2:55)

Future Meeting Dates

June 16, 2020	1:00 p.m. - 3:00 p.m.	WebEx
July 15, 2020	1:00 p.m. - 3:00 p.m.	WebEx
August 18, 2020	1:00 p.m. - 3:00 p.m.	WebEx
September 15, 2020	1:00 p.m. - 3:00 p.m.	WebEx
October 20, 2020	1:00 p.m. - 3:00 p.m.	WebEx
November 17, 2020	1:00 p.m. - 3:00 p.m.	WebEx

December 15, 2020   1:00 p.m. - 3:00 p.m.   WebEx

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Antitrust:
You may not discuss any topics that violate, or that might appear to violate, the antitrust laws including but not limited to agreements between or among competitors regarding prices, bid and offer practices, availability of service, product design, terms of sale, division of markets, allocation of customers or any other activity that might unreasonably restrain competition. If any of these items are discussed the chair will re-direct the conversation. If the conversation still persists, parties will be asked to leave the meeting or the meeting will be adjourned.

Code of Conduct:
As a mandatory condition of attendance at today's meeting, attendees agree to adhere to the PJM Code of Conduct as detailed in PJM Manual M-34 section 4.5, including, but not limited to, participants' responsibilities and rules regarding the dissemination of meeting discussion and materials.

Public Meetings/Media Participation:

Unless otherwise noted, PJM stakeholder meetings are open to the public and to members of the media. Members of the media are asked to announce their attendance at all PJM stakeholder meetings at the beginning of the meeting or at the point they join a meeting already in progress. Members of the Media are reminded that speakers at PJM meetings cannot be quoted without explicit permission from the speaker. PJM Members are reminded that "detailed transcriptional meeting notes" and white board notes from "brainstorming sessions" shall not be disseminated. Stakeholders are also not allowed to create audio, video or online recordings of PJM meetings. PJM may create audio, video or online recordings of stakeholder meetings for internal and training purposes, and your participation at such meetings indicates your consent to the same.

Participant Identification in WebEx:

When logging into the WebEx desktop client, please enter your real first and last name as well as a valid email address. Be sure to select the "call me" option. PJM support staff continuously monitors WebEx connections during stakeholder meetings. Anonymous users or those using false usernames or emails will be dropped from the teleconference.

On the Phone, Dial *6 to Mute/Unmute	Linking Teleconference Connection to Webex
	When logging in to the meeting, access Webex first and select the "call me" feature to receive a direct call to your phone. Using this feature will connect your name to your Webex presence.

Join a Meeting	1. Join meeting in the WebEx desktop client
	2. Enter name (*First and Last**) and corporate email
	3. Under "Select Audio Option" select "Call Me" option from the dropdown menu

Note: Anonymous users or those using false usernames or emails will be dropped from the teleconference.

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