

Account Manager, Bulletin Board, Data Viewer, Messages, Resource Tracker, Tools Home and Voting Roadmaps

As of June 14, 2022

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- Added Account Manager enhancements release information.
- Updated Voting enhancements release information.



Impact Details

Product - Action Required	Deadline	Who May Be Affected
Voting (Train) – Users should review release information	June 13 2 p.m. – 5 p.m.	Voting tool users
Voting (Production) – Users should review release information	June 15 6 p.m. – 8 p.m.	Voting tool users









Impact Details

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Product - Action Required	Deadline	Who May Be Affected
Account Manager (Train) – Users should review release information	July 21 6 p.m. – 8 p.m.	Account Manager tool users
Account Manager (Production) – Users should review release information	July 28 6 p.m. – 8 p.m.	Account Manager tool users









Impact Details - User Certification

Action Required	Deadline	Who Is Affected
Validate users, user access, and user relationship to main (Member) account	August 31	Company Account Managers (CAMs) – Account Manager

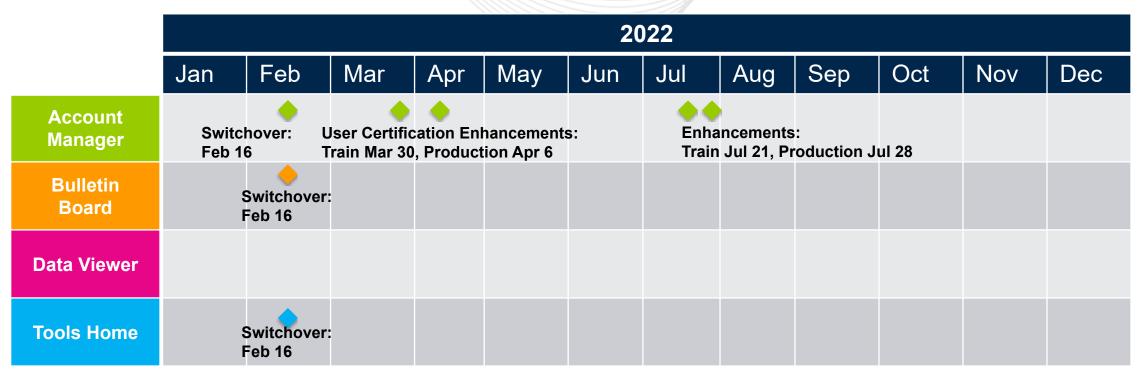








2022 Roadmap Account Manager, Bulletin Board and Data Viewer



* Tentative















Active Voter

 When a user logs into the Voting Application, they will have to register as the active voter for a meeting. Previously, the first user who logged in was automatically logged in as the active voter

Roster Management

- Enhanced User Interface with a Wizard format to make it easier for the Roster Managers to manage the contacts for any given roster for which they are the Roster Manager
- Enabled advanced reporting to review information for rosters that the Roster Manager manages
- New Roster Request Workflow
- Ability to duplicate an existing Roster



New Features

- Tab through fields in using the keyboard.
- Search for a user by email and company domain.
- Update a user's first name.

New Displays

 Now displaying Company Information – Company Type, Company Sub-Type, Line of Business, Sector and Market Participant.



Account Manager User Certification

- CAMs will be asked to validate all users, review user access, and establish a relationship (agent, vendor, employee) between users and the main (Member) account
- 60 day window to complete: June 30 to August 31 in Production
- Details available in <u>Manual 33</u>, section 5.1.8
- <u>User guide</u> available on Account Manager webpage of PJM.com



Train Environment

• June 14 to June 29

Training/Demo for CAMs*

- June 15: 10 a.m. to 11 a.m.
- June 20: 1:00 p.m. to 2:00 p.m.
- July 7: 10:30 a.m. to 11:30 a.m.

Open House Sessions

- July 12: 1 p.m. to 3 p.m.
- July 21: 10 a.m. to 12 p.m.
- July 26: 1 p.m. to 3 p.m.
- August 5: 10 a.m. to 12 p.m.
- August 11: 1 p.m. to 3 p.m.
- August 18: 10 a.m. to 12 p.m.
- August 25: 1 p.m. to 3 p.m.
- August 30: 1 p.m. to 3 p.m.

^{*}Training sessions are scheduled as Special Sessions of the Tech Change Forum and are open for Registration

^{*}Sessions will be recorded and posted on PJM.com



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Account Manager, Bulletin Board, Data Viewer, Messages, Resource Tracker, Tools Home and Voting



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Product Details

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Account Manager is used to create accounts and request and grant access to PJM's tools and website.

- Grants access to PJM Tools
- Member CAM's can determine and regulate access for their respective companies



Bulletin Board facilitates power contracting activity.

- Provides users with access to a larger pool of buyers and sellers of contracts for electric power
- Allows users to view, post and modify requests to buy or offers to sell power



Data Viewer allows users to view operational and market data graphically.

- Display real-time LMPs, IT SCED forecasted LMPs, Dispatch Rate, etc.
- Customizable data plots and graphs



Messages provides updates and important messages regarding PJM tools.

Key Product Features

Used by members to view updates and important messages regarding PJM tools



Resource Tracker provides generation owners a single view of generator ownership information as recorded across various PJM applications.

- Single point mechanism for generator ownership information
 - Ownership changes
 - Energy, Capacity and Ancillary Service Ownership
 - Marketing Company
 - Dispatching Company
- Annual confirmation period
- Created in 2013 to provide a single point mechanism for Generation Owner Information
- In December 2018, Stakeholders endorsed changes to move confirmation period to Annually with a 4 week duration
- In 2019 and 2020, further enhancements were made to field logic and formatting



Voting facilitates voting at the Markets and Reliability Committee and Members Committee meetings.

- Facilitates voting at the Markets and Reliability Committee and Members
 Committee meetings
- Vote tallying and reporting
- Tool also allows both on-site and remote meeting attendees to cast votes for agenda items presented to the membership for voting