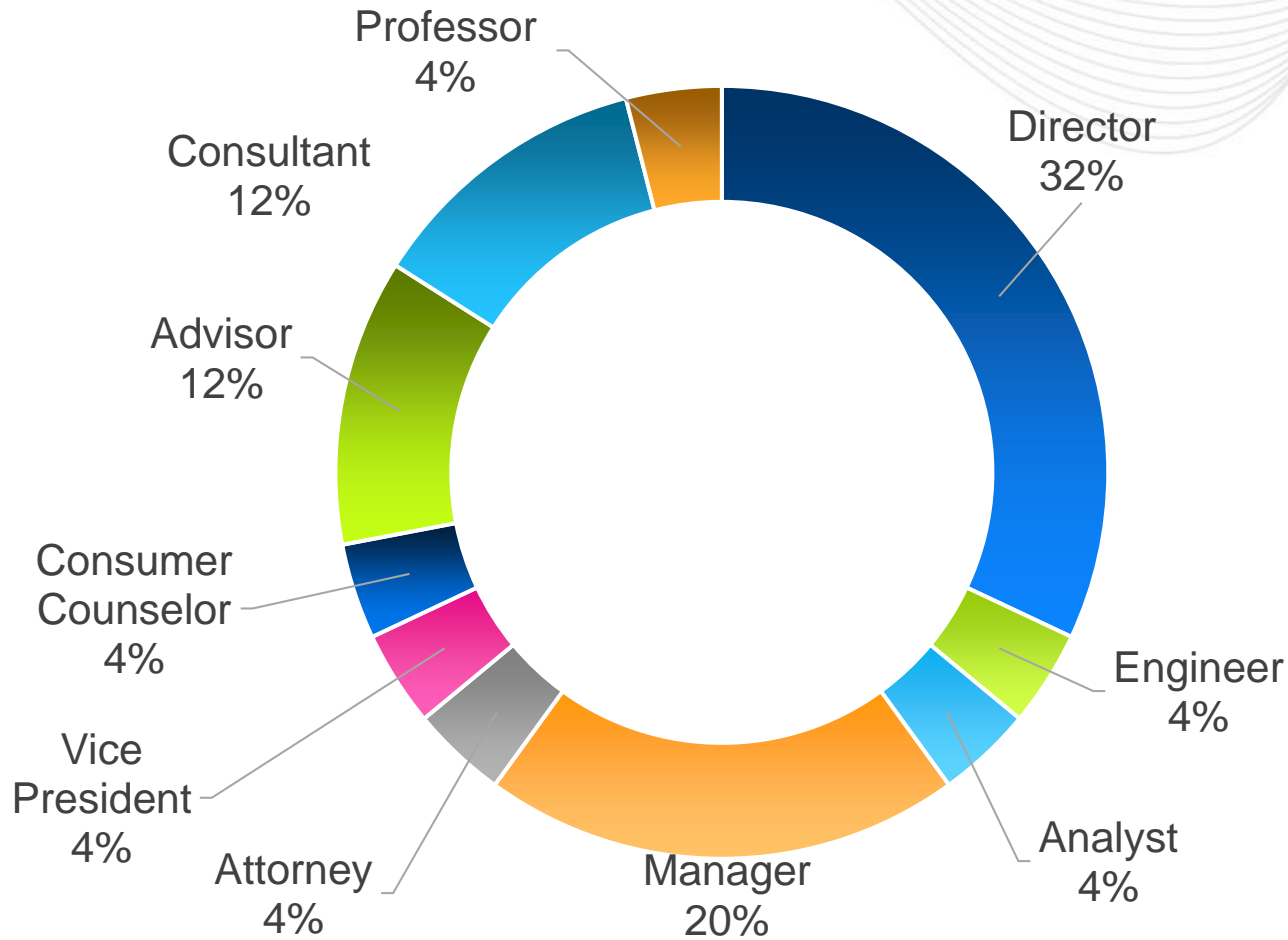


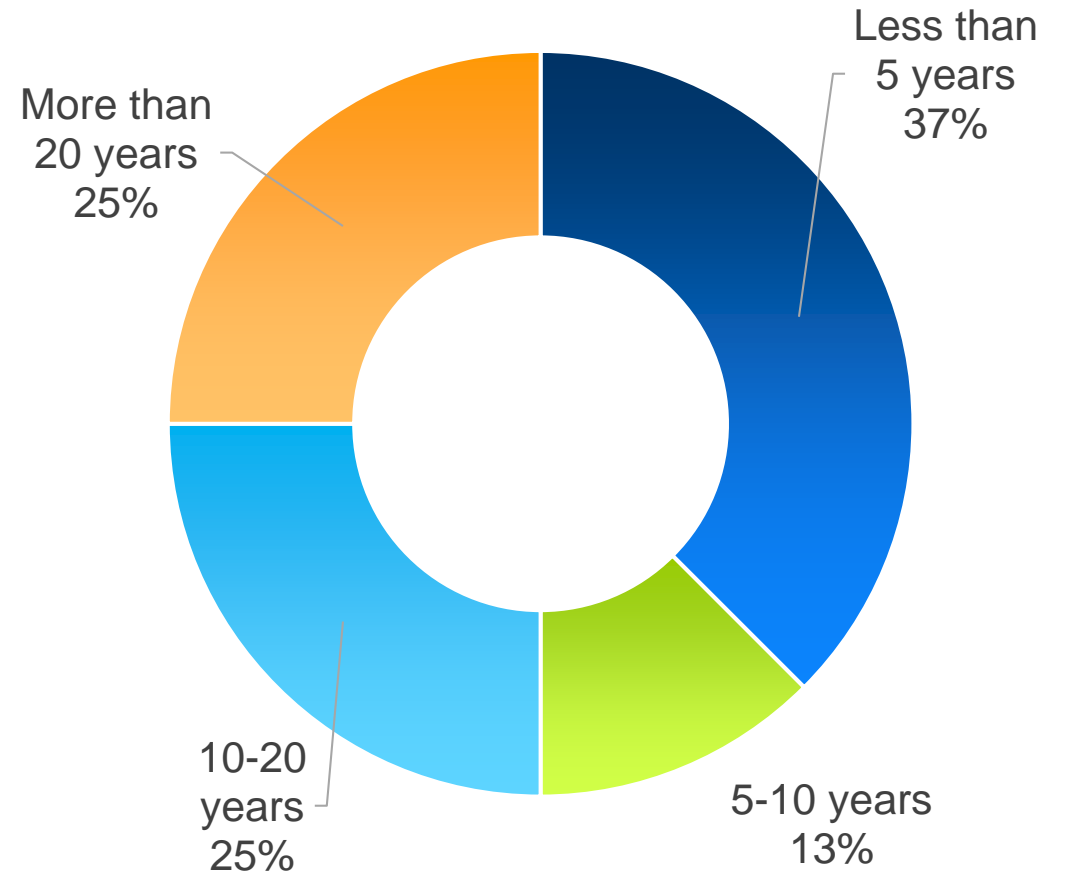
Web Retention

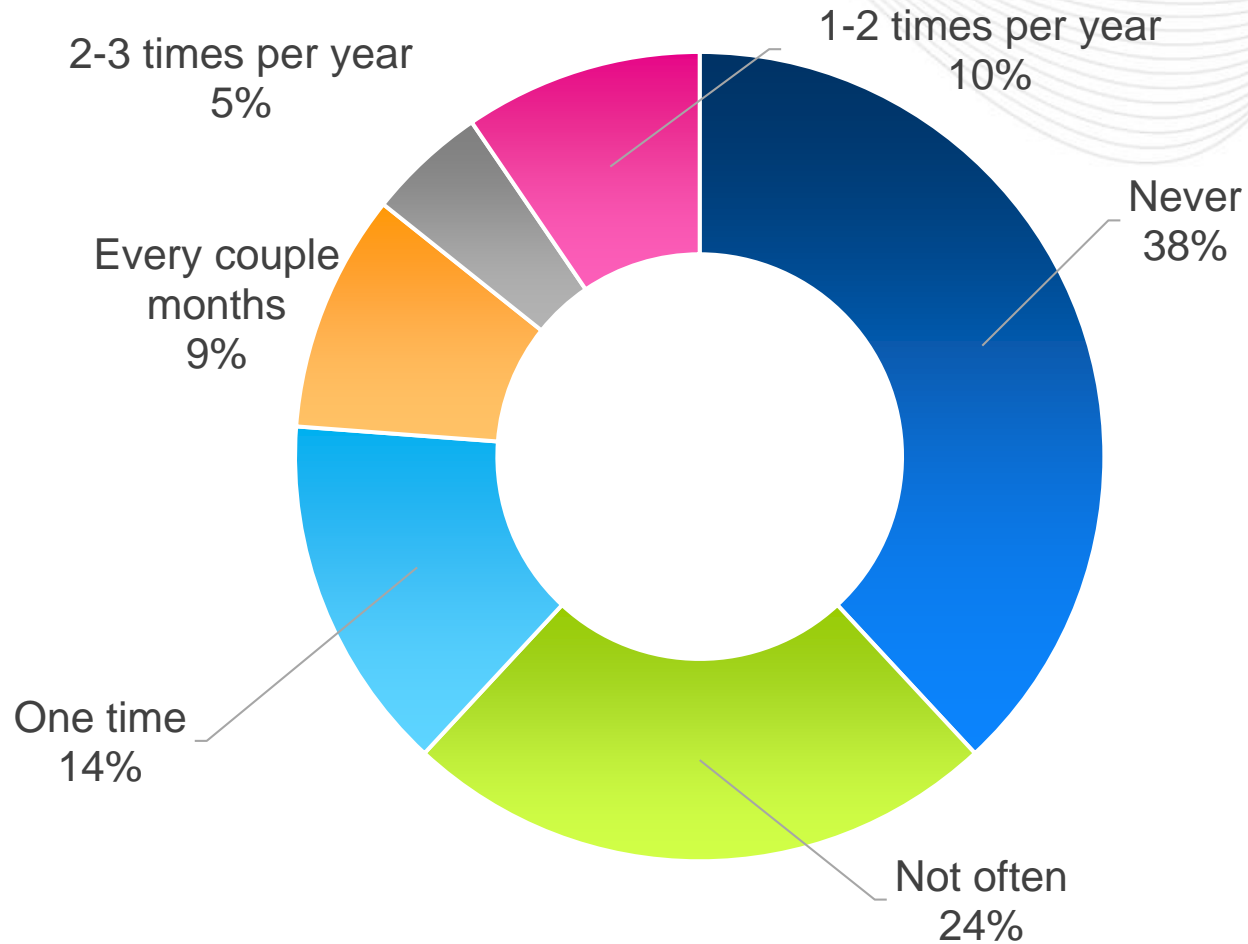
Tawnya Luna
Lead User Experience Strategist
Stakeholder Process Forum
May 26, 2020

Role



Time in Industry





Stakeholder Quotes

I haven't seen anything removed that I would consider to be a matter of record. Occasionally there are sites where I get an error message, but not often.

I am constantly searching the PJM website and utilizing past materials. I do not run into broken links enough to bring it up as a problem.

Your data retention policy is pretty good. There's occasions where we're looking for something in the past and it's very difficult.

Every now and then links don't work in older process documents.



- Beginning of issue (problem statement & issue charge) (1 user)
- Re-education – presentations, packages
- End of issue / evidence of specific decisions (2 users)



Stakeholder Quotes

It is an important thing that stakeholders be able to go back and look at things. Within two years time we forget about things. Sometimes it takes over two years to get FERC response...It's nice be able to look back and reinforce your memory on certain topics.

Typically, the use is when I need to reeducate myself on materials or initiatives that are done in the past. Typically it's education or package material and outcomes.



	Request	Web	Corporate
Meeting material associated with an issue	2-permanent	Permanent	7-10
Meeting material unassociated with an issue	2-permanent	4-10	7-10
TOA-AC	10	6	7
Quadrennial review	4-8	4	Varies by group
Voting results	> 4	4 or more	Varies by group

All values shown in years



Retention of Markets & Operations Section

	Request	Web	Corporate
Markets & Operations Section Public Data	8	Varies	Varies
Demand Response	Permanent	5	7
Capacity Market (RPM)	-	-	-
Auction Results & ARR Credits	10-20	17	7
Billing & Settlements Section Data	Permanent	Varies	Varies
SECA Refund Reporter	> 2	2	7
Rate Filings	9	3	Not PJM records

All values shown in years

	Request	Web	Corporate
Filings where there isn't a final order	Permanent	4	7
Links in filings	4 - permanent	Varies	Varies
Reports & notices		4	3-10
Polar vortex	> 2	Varies	Varies
5 coincidental peaks	5	2	10
Load forecast methodology	Permanent	2	10
Load forecast reports	11, 10-20, 21	10	10
Queue agreements	10	Permanent	Termination + 7
Performance assessment	> 2	2 or more - varies	7

All values shown in years

ISO/RTO	Policy
ERCOT	Permanent
IESO	No policy
ISO New England	7 years with exceptions
MISO	2 years
SPP	No policy

- It's not all retention.
 - Continue to improve search engine and organization of website
 - All content does not need to be retained
 - Hotline should be better equipped to respond to requests
 - Address issue tracking process deficiencies

- Review findings
- Identify policy changes
- Legal meeting
- Stakeholder Process Forum May 26
- Continue to optimize search engine
- Search upgrade to cloud 2021
- Develop knowledge article