Welcome (10:30 – 10:32)

1. Jim Gluck, PJM, provided a brief overview of the Tech Change Forum as well as ground rules and the agenda.

Past Meeting Issue Review (10:33 – 10:35)

2. Jim Gluck, PJM, followed up on a question regarding security of member data as it relates to IMM stating content is being drafted for the May Tech Change Forum meeting.
   
   A. Mr. Gluck requested feedback from the latest DR Hub and Data Viewer releases. No feedback provided at this time.

Initiative Roadmap Updates (10:35 – 10:45)

3. Roadmaps for PJM initiatives through 2017 will be presented.

   A. Carla Thew, PJM, reviewed the 5-Minute Settlements roadmap. She stated that PJM is ahead of schedule and the XSD business rules and CLI will be live in early May. Ms. Thew also stated the updates to MSRS are planned for 3Q17 with more details to be provided during the May Tech Change Forum meeting.

   B. Carla Thew, PJM, reviewed the Coordinated Transaction Scheduling (CTS) roadmap. She stated the roadmap has not changed since the previous meeting. Ms. Thew also mentioned the CLI documentation and user guide is available on the MISO CTS section of PJM.com.

   C. Kim Warshel, PJM, provided an update on the Intraday Offers roadmap. She stated that PJM is going through internal product testing where users should be accessing the Markets Gateway Train environment to conduct user testing. Ms. Warshel mentioned that updated documentation, examples and FAQs are available for download within the Intraday Offers section of the Markets Gateway tool web page on PJM.com.

      Ms. Warshel reminded participants to pare down schedule IDs. She stated the sooner users can begin those changes the easier transition into go-live for Intraday Offers.

Product Roadmap Updates (10:45 – 11:45)

4. Roadmaps for individual products will be presented.

   A. Gerry McNamee, PJM, provided an update for the DR Hub roadmap. He provided background details that DR Hub replaced eLRS. eLRS will be in read only mode for the next month and will be retired on May 25.
Mr. McNamee stated that DR hub went live in Production on April 2, 2017. He mentioned how several updates were made based on member feedback. Mr. McNamee also stated another release is scheduled for May 11 including updates regarding winter peak load seasonal resource change based on FERC Docket No. ER17-367-000. He mentioned there will be a 15-20 minute outage to the user interface and web services. Mr. McNamee stated the June release scope has been slightly reduced based on the required FERC docket changes for winter peak load seasonal resource change.

B. Gerry McNamee, PJM, provided roadmap updates for Member Voting, eDataFeed, Data Viewer and Account Manager. He reviewed the April 19th release details for the Data Viewer update. Mr. McNamee mentioned that eDataFeed, Account Manager and the Member Voting application will not have any changes for this month. He did state that updates will be available at the end of May for Data Viewer (LMP hourly price graph), Member Voting (correction on dashboard pages) and Account Manager (internal updates for meeting registration profile and SUMA flag).

C. Jennifer Conn, PJM, reviewed the Capacity Exchange roadmap. She stated at this time no updates have been made to the roadmap and the team is currently working on development. Ms. Conn mentioned the production go-live date is expected 1Q18. She stated a design review will be held at the May Tech Change Forum meeting. Ms. Conn also mentioned the team expects to have the XML specifications available in August. She stated users can receive additional information by subscribing to the RPM Auction User Information list by navigating to My Email Lists page on PJM.com, choosing Markets & Operations and selecting the checkbox next to the email list.

James Manning, North Carolina Electric Membership Corporation, was curious if PJM is trying to stage with the increment auction. Jennifer Conn, PJM, stated the timeline is based on development and the releases will be worked around the auctions.

D. Ian Mundell, PJM, provided an update to Gen Model and Queue Point roadmap. He stated the Gen Model release was held at the beginning of April and the window is currently open, accepting submissions for what was requested in the 2016 MOD-032 window as well as new generator submissions. Mr. Mundell stated Queue Point is on track for the June release to include all remaining forms available in the user interface.

Sushma Hegde, PJM, provided an update on the new interconnection queue project. She stated the project will consolidate the following pages on PJM.com: Generation Interconnection, Merchant Transmission, Long-Term Firm Transmission Service and ARR Analyses. Ms. Hegde stated the beta version will be available in 3Q17 for participants to being transitioning existing code to the new formats.

E. Sushma Hegde, PJM, reviewed the PJM.com roadmap. She stated interviews for the Planning Section Refresh were completed and development has started. Ms. Hegde mentioned the CEII Secure Content Access efforts will fall into 3Q17.

Dave Pratzon, GT Power Group, had a question regarding PJM.com content. He stated that every once in a while he will get an error page when clicking on links and would like to
know what is the preferred way on providing that feedback. Sushma Hegde, PJM, stated the best way is to utilize the Web Feedback link on the right side of the web page.

F. Beth Schweser, PJM, provided an update to the ExSchedule roadmap. She stated the eTags 1.8.3 release will go live in the Train environment in July, with a Production roll out in October where only new tags will be available starting November 7. Ms. Schweser provided details around the ExSchedule Enhancements release.

Dave Pratzon, GT Power Group, was curious if members were required to coordinate for any changes. Beth Schweser, PJM, stated that members will not be required to make any changes for the enhancements.

G. Beth Schweser, PJM, provided an update to the OASIS roadmap. She stated the refresh project will have a first look during 3Q17. Ms. Schweser also stated the NAESB WEQ-012 PKI Implementation release will be available in Train during 3Q17 and a production go live in 4Q17.

H. Chidi Ike-Egbuonu, PJM provided an update to the eDART roadmap. She mentioned a new user guide will be available for users by the end of April, 2017. Ms. Ike-Egbuonu reviewed several changes to the 2017 roadmap due to priorities. She stated Alicia Battaglino, Exelon Generation Co., LLC, had a question in regards to the GO Survey updates and curious if PJM is looking for all generator information in one upload as well as if the GO should hold the survey until completed or send to PJM as information is added. Chidi Ike-Egbuonu, PJM, stated the information will be part of the CSV download and can be split off per unit and sent to who it must be sent to. The GO can upload the information as collected.

Ms. Ike-Egbuonu stated the eDART team is looking to begin design and get stakeholder feedback for the eDART refresh and expects to go live in Train 3Q17. She stated requirements are being gathered for the Web user interface refresh aspect of eDART and the user experience team is looking for volunteers on who utilizes the web user interface. Any interested volunteers should email (transmission users first and then generation owners) to edarthelp@pjm.com.

I. Todd Hiser, PJM, reviewed the eGADS roadmap. He stated eGADS implemented two minor releases due to NERC requirements and database upgrades. He mentioned at this time no further updates for eGADS are planned.

Robbie Staples, Old Dominion Electric Cooperative, questioned if eGADS provided browserless functionality. Todd Hiser, PJM, stated eGADS is accessible via the user interface and does not provide browserless.

J. Venkat Balachandran, PJM, provided an update on the Data Miner 2 roadmap. He stated the API guide was published and communicated to the Technical Notifications subscription list in early April. Mr. Balachandran reviewed the list of beta feeds on slides 6-8 that will be available on the user interface for Data Miner 2. He stated users may email DataMiner2Support@pjm.com to request support for beta testing and users are able to review details within the API guide for beta testing.
K. Foluso Afelumo, PJM, reviewed the Tools Security roadmap. He stated the multi-factor authentication release will be implemented in Production on June 6. Mr. Afelumo mentioned the multi-factor authentication would require a one-time soft token password that may be stored on a maximum of five (5) devices for 90 days. He also stated there would be a platform upgrade set for May 10 in the Production environment along with maintenance on May 25th. Mr. Afelumo stated that Data Viewer would be moving on to the single sign on platform in late May for Train and mid-June for Production. He also mentioned applications will be moving to 24-hour sessions based on feedback from users.

L. Bill Walker, PJM, reviewed the Communities roadmap. He provided a description of the Member Community and the newly added Tech Change Forum Community. Mr. Walker also stated the Planning Community has been reviewed at the Planning Committee and the Transmission Expansion Advisory Committee with a go-live in September 2017.

M. Jim Gluck, PJM, reviewed products that do not have any planned updates for the next month.

Lunch (11:45 – 12:30)

General Updates (12:30 – 1:00)

5. Jim Gluck, PJM, reviewed unexpected production issues that occurred over the past month as well as discussed enhancements to backup locations and business continuity planning efforts.

6. John Ippolito, PJM, reviewed the network implementation roadmap. He stated the team completed 8 firewall upgrades to date and have 16 upgrades planned for the upcoming months. Mr. Ippolito stated the upgrades will be communicated via the Tech Change Forum as well as the Technical Notifications subscription list (TechNotify).

   Dave Pratzon, GT Power Group, stated one of the firewall upgrades was moved forward for emergency reasons. He questioned if all the network upgrades have been planned for the specific timeframe in the roadmap or will be moved up sooner. John Ippolito, PJM, stated the project started last year with vendor support scheduled for 2017. Mr. Ippolito mentioned the emergency release was moved around for priority relating to the DMZ firewalls to avoid member impacts.

   Jim Gluck, PJM, stated the firewall replacement has been planned for some time. He indicated the plan is to make the updates minimal to members.

7. Bill Walker, PJM, provided a demonstration of the Member Community and Tech Change Forum Community. He reviewed the “refreshed” Member Community allowing users the ability to easily search for knowledge articles, initiate requests and view trending articles.

   Dave Pratzon, GT Power Group, questioned how details are tracked when someone has a case open and receive information directly via email. Bill Walker, PJM, stated as long as emails are sent as a response to the case itself, the email correspondence will be added directly to the case.
Mr. Walker also showcased “Other Services” and how to navigate to the Member Community from PJM.com. He then continued to the Tech Change Forum Community and provided a review of how the intent of this community is to provide moderated discussion boards.

Dave Pratzon, GT Power Group, questioned how users may access the Tech Change Forum Community. Bill Walker, PJM, indicated the community is live but not currently on PJM.com until later today. Monica Burkett, PJM, stated all members with access to the Member Community have access to the Tech Change Forum Community and can access it via the top navigation from the Member Community.

Jim Gluck, PJM, mentioned the main focus of the Tech Change Forum Community is to allow members, developers and other users to collaborate on technical changes and request with PJM tools.

Dave Pratzon, GT Power Group, was curious how business users that have questions on 5-Minute Settlements should provide those details to PJM. Bill Walker, PJM, stated users can still utilize the Member Community to reach out to a client manager or submit the Contact Us form on PJM.com to ensure questions are answered appropriately. Jim Gluck, PJM, also stated any questions with a business focus submitted to the Tech Change Forum Community discussion board will be moderated and sent over to a subject matter expert to provide the answer.

Lauren Strella, PJM, provided an overview of the upcoming Planning Community. She stated the community was introduced at the January Planning Committee meeting. Ms. Strella mentioned there are two components for the tool: internal and external. She stated the internal component is for employees to track questions and inquiries where the external community component is a public forum to improve widespread communication.

Ms. Strella reviewed various features of the Planning Community including tagging, “up-voting”, and moderation as well as transparency to ensure open communication and fairness of information. She stated the Planning Community is expected to go live in 3Q17. Ms. Strella also mentioned the team is looking for beta testers that can reach out to RTEP@pjm.com.

**Product and Technical Announcement / Design (1:00 – 1:30)**

9. Venkat Balachandran, PJM, provided a Data Miner 2 demonstration. He stated the API guide was sent to the Technical Notifications subscription list (TechNotify) at the beginning of April. Mr. Balachandran provided an overview of the API portal and highlighted the new features such as the user profile display and the usage/health check for APIs along with top subscribed products. He stated users may see available APIs upon clicking the “apis” button when they are subscribed to that API.

10. Gerry McNamee, PJM, provided a demo of the recently released Data Viewer features. He demonstrated the three (3) improvements for Data Viewer which were: (1) cycle tab error message, (2) ticker on right; and (3) correct to multiple panes.

**Future Meeting Announcement (1:30 – 1:45)**

11. Jim Gluck, PJM, highlighted important upcoming dates.
• May 23, 2017 – next Tech Change Forum meeting
• Early May – 5-Minute Settlements XSD business rules and CLI available
• May 11 – DR Hub release
• June 6 – Account Manager Multi-factor authentication production release for CAMs

General Feedback (1:55 – 2:00)

Future Forum Topics

Future Forum Dates

May 23, 2017 10:00 a.m.  PJM Conference & Training Center/ WebEx
June 20, 2017 10:00 a.m.  PJM Conference & Training Center/ WebEx

Author: Monica Burkett

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