eTRM – Future Enhancements

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TECHNICAL FORUM

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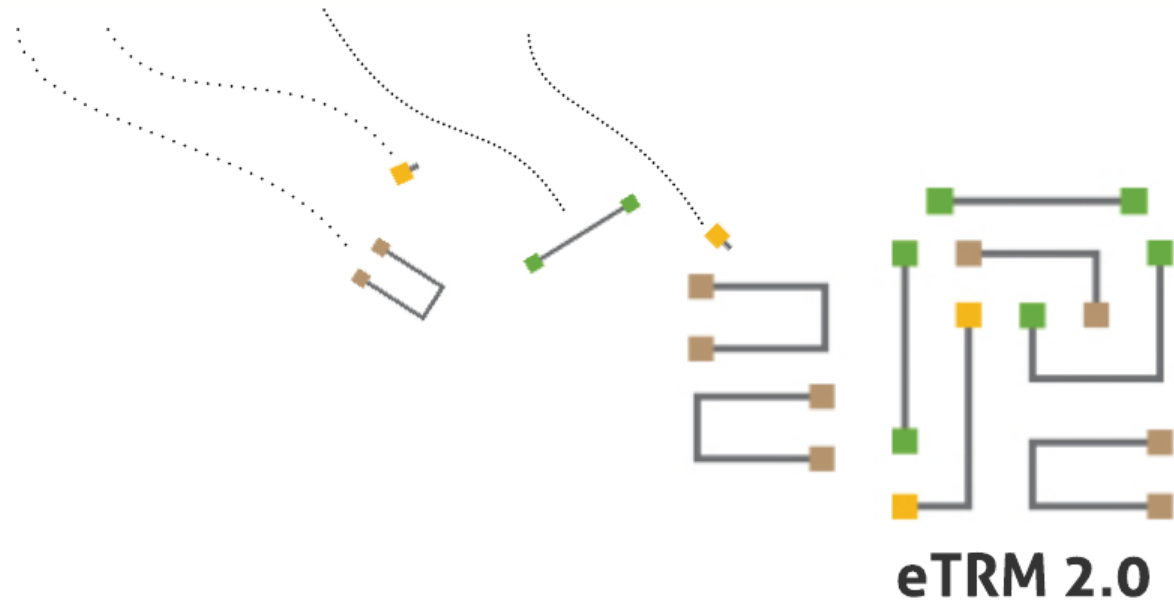**DECEMBER 11, 2018**

Overview

- Completion of eTRM 1.0
- Future Enhancements
  - ❏ Priority 1
  - ❏ Priority 2
  - ❏ Priority 3
- Next Steps

Completion of eTRM 1.0

- eTRM ver. 1.0 on track for completion as planned, with contracted-for functionality.
  - ❑ Contract contained detailed, specific and lengthy list of business and technical requirements.

eTRM 1.0

eTRM 2.0

eTRM – Future Enhancements

- During eTRM development and testing, additional functionality, enhancements and features were identified by testing team
  - 60 total items
  - Items grouped into three categories based on complexity and/or priority:
    - Priority 1 – Less complex; system integration
    - Priority 2 –More complex, but will enhance existing features and functionality
    - Priority 3 – Need further vetting

(26 items)

- **Dashboard**: Make user dashboard customizable by user
  - ❑ Show measures by end-use category
  - ❑ Show measures by sector
  - ❑ Show measures by delivery type
- **Calculations**: Expand calculation capabilities for equations
  - ❑ Currently handles arithmetic calculations (+, -, *, /)
  - ❑ Expansion would enable running aggregations and arrays
- **Cost-Effectiveness Integration**: Integrate eTRM with CET
  - ❑ Include cost-effectiveness on measures and permutations by linking to CET
  - ❑ Would allow system to keep current C-E ratios available and updated as underlying data is updated
- **CEDARs Integration**
- **Integration with POU Reporting Tool (In Development)**

(11 items)

- **Workflow Management**: Add automated workflow process to measure review
  - ❑ Current process manually sets measure review status
  - ❑ Current process prone to human error, if measure developer/reviewer forgets to change status or selects wrong status
  - ❑ Automated process eliminates human error
  - ❑ Can also be set up to automatically notify next person in review chain
  - ❑ Integrate with or meet current utility requirements for internal approval / governance
- **Reporting**: Add Report Manager tool to system
  - ❑ Key reports have been built into platform
  - ❑ Additional reports would require development team to build out on custom basis
  - ❑ Report Manager would enable trained users to develop variety of useful reports
    - ✕ Measure aging reports
    - ✕ Reference usage reports
    - ✕ Measures in pipeline
- **Simplify**: Collapse permutations that are within 10% (or some other pre-defined range)

(23 items)

- **Expand Error Checking**
  - ❑ Current error-checking is limited to validating equations
  - ❑ Add range-checking on table values
  - ❑ Other capabilities may be identified as platform is used
- **Incorporate Monte Carlo/Scenario Analyses**
  - ❑ This would allow measure developers to conduct "what-if" analysis
  - ❑ Change key values to assess effects on savings, cost-effectiveness
  - ❑ A statistical tool could run thousands of scenarios programmatically to generate ranges of output values
- **Customizable Tables**
  - ❑ Some tables have numerous columns that may not be relevant to some users
  - ❑ Customization would allow users to hide columns they do not want to see, rearrange columns and sort rows
  - ❑ Users could save their table sorting preferences for next time

Next Steps

- Additional user input?

- "Voting" by core team

- Separate input from CPUC and CEC about specific needs they have, particularly around integration with their systems

- Pricing by vendor

- Discuss with funders

- Finalize BRs and TRs

- Return to funders for authority to spend