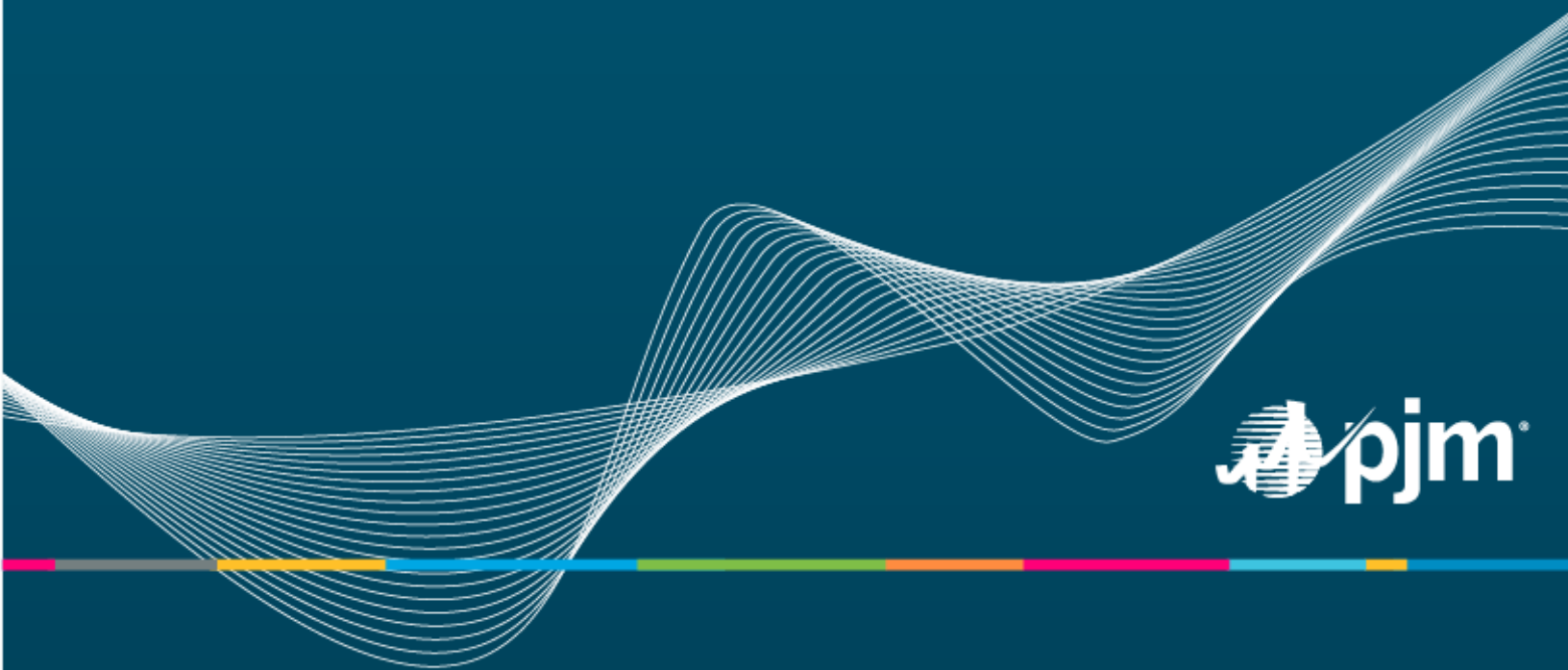
# Community User Guide

Community Administrators
July 11, 2017



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# Overview

Communities have been created in order for PJM employees to collaborate with stakeholders on various initiatives. PJM Communities can contain self-service member needs, knowledge articles as well as discussion boards to collaborate with other stakeholders and PJM employees. Each community requiring discussion boards will be moderated prior to information being posted.

# Community Access

Users are required to request Community access. If a member requests access to the Member Community they are then granted access to the Tech Change Forum Community and Planning Community. Access can also be requested through the registration form for each individual Community. There are various ways to access the registration form:

1. Navigate directly to registration form:
    a. Member Community - http://www.pjm.com/about-pjm/member-services/member-forms/member-community-registration.aspx
    b. Tech Change Forum Community - http://www.pjm.com/committees-and-groups/committees/community-registration.aspx?id=tech_change
    c. Planning Community - http://www.pjm.com/committees-and-groups/committees/community-registration.aspx?id=planning
2. Navigate to Community web page on PJM.com, click on registration form button/link to request access.
3. Navigate to Community URL, receive error when trying to login, click on registration form link.

## *How to Get to Each Community*

Community information is located on the PJM.com corporate website. Users can also navigate to each Community using the direct URL.

### Member Community

- Informational web page - http://www.pjm.com/markets-and-operations/etools/member-community.aspx
- Community URL - http://pjm.force.com/Members

### Tech Change Forum Community

- Informational web page - http://www.pjm.com/committees-and-groups/tech-change-forum.aspx
- Community URL – https://pjm.force.com/techchangeforum/

### Planning Community

- Informational web page – http://www.pjm.com/committees-and-groups/committees/pc.aspx
- Community URL - https://pjm.force.com/planning

# Community Overview

The Member Community has different components than the discussion based communities such as the Tech Change Forum Community and the Planning Community. All components will be reviewed in this section. Users may only see partial components when accessing each community.

Standard components across all communities will be the community usage guidelines, search features as well as the legal disclaimer.

## *Home Page Components*

### Knowledge Articles

The Knowledge Articles section provides users with the ability to browse through various topics for knowledge articles and answers to frequently asked questions. These articles are read only and can be used for self-service support. The articles have been categorized based on PJM areas and sub-areas similar to the navigation on PJM.com.

*Available on: Member Community*

### Topics

Topics are listed based on each Community requirements. This section can have a main topic along with sub-topics based on the level of details per topic. Once a user navigates into a topic they will see a listing of discussion boards within that topic as well as a tab for articles related to that topic. More details can be found within the Topics Overview section.

*Available on: Tech Change Forum Community, Planning Community*

### My Feed

The My Feed area provides a listing of discussions that you have "followed". When users initially access a community this area is typically empty. To learn more about following a topic see the Follow Button section.

*Available on: Tech Change Forum Community, Planning Community*

### Recent Activity

This area provides a listing of the user name, what topic area they recently posted in and when they were last active.

*Available on: Planning Community*

## Customer Services

The Customer Services section provides links and descriptions to customer service features such as creating a case and viewing cases.

*Available on: Member Community*

## Other Services

The Other Services section provides links to other customer service features such as requesting demand bid access, initiating a generation transfer process and requesting a declaration of authority.

*Available on: Member Community*

## Trending Articles

The Trending Articles section provides a "top 5" listing of recently viewed knowledge articles. These articles are currently being viewed by PJM employees and Community users to assist with self-service needs.

*Available on: All Communities*

## Navigation Bar

Each Community navigation bar features links to various areas within the Community itself as well as PJM.com web pages for additional details and information about that Community.

*Available on: All Communities. Navigation details below.*

### Member Community

- Home
- Knowledge Articles
    - General
    - Markets
    - Planning
    - Settlements
    - Operations
    - PJM Tools
    - More topics…
- Customer Services
    - Create a Case
    - View My Cases
- Other Services
    - Request Demand Bid Access
    - Request Demand Bid Limit Increase
    - Initiate Generation Transfer Process

    - Request Declaration of Authority (DOA)
    - Request a Visit to PJM Campus
- Communities
    - Tech Change Forum Community
    - Planning Community

Tech Change Forum Community

- Home
- Topics
    - Initiatives
    - General
    - Billing, Settlements & Credit
    - Markets
    - Operations
    - Planning
    - Technical
- Roadmaps
- Tech Change Forum
- Communities
    - Member Community
    - Planning Community

Planning Community

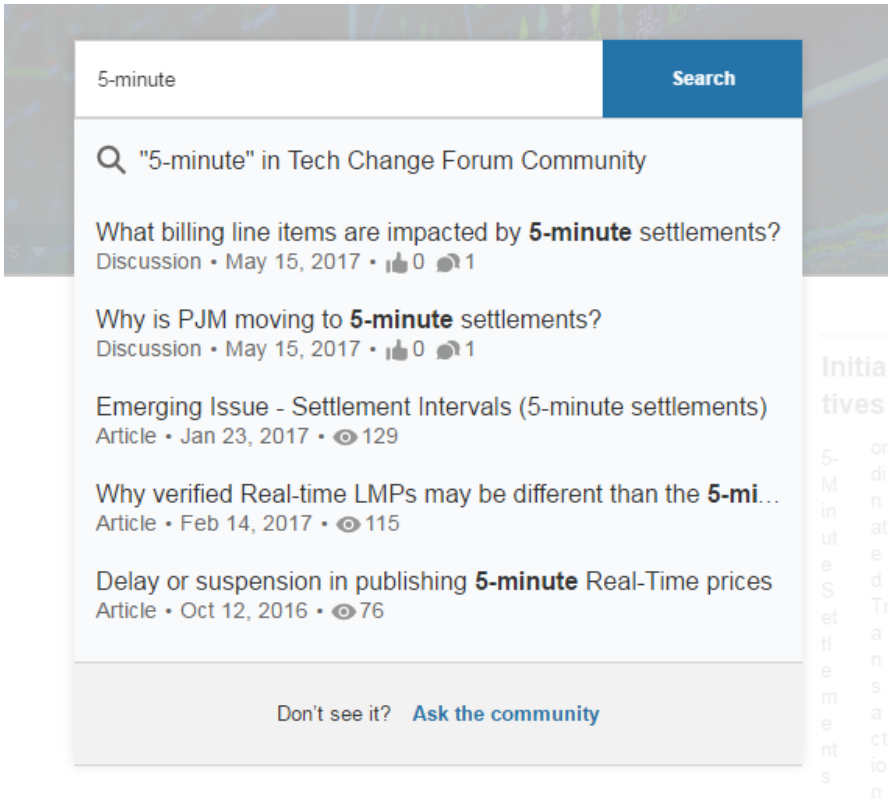
- Home
- Topics
    - Transmission Planning
    - More Topics…
- Communities
    - Member Community
    - Tech Change Forum Community

## Search Bar

Users may search for items throughout each Community utilizing the Search bar. When conducting a search the following information could appear in the results based on the type of Community:

- Knowledge articles
- Discussion boards
- Topics and keywords

When initially typing in a keyword or phrase the search box will populate some results that users can easily navigate to. If a user does not see what they are looking for they can simply click the Search button or press the Enter key. For example, when searching 5-minute in the Tech Change Forum Community, the following results appear automatically:

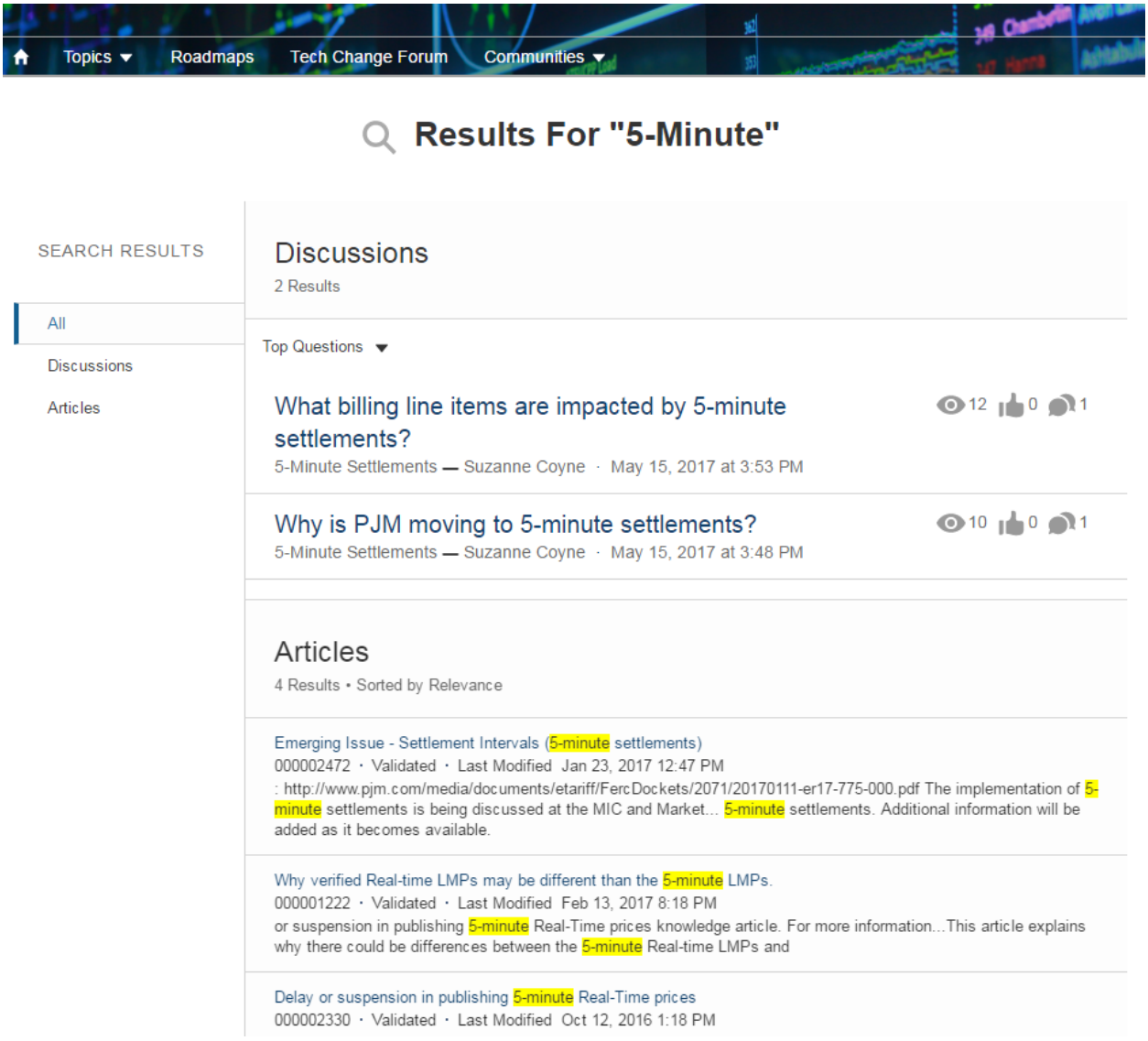



Users may then navigate to a discussion board featuring that keyword or read one of the knowledge articles available for self-service needs.

### Search Results

When a user clicks on the Search button or presses the Enter key while doing a Search a new page appears showing a categorized results page. Depending on which Community you are in you will either see Articles *or* Discussions and Articles. Filters are available on the left hand side to further refine your search results.

The following image provides a look at what the end user shall see in a discussion based forum.

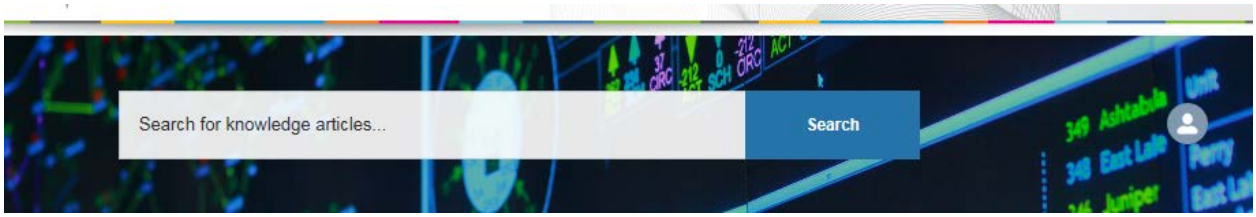



*Available on: All Communities*

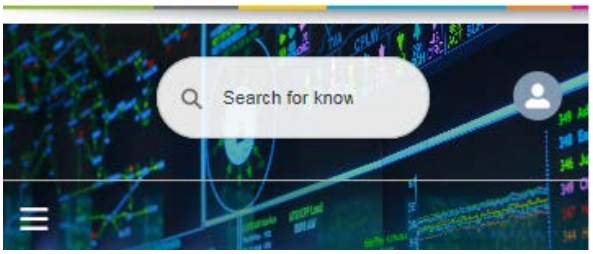
## User Profile Menu

Depending on the screen resolution, to the right of the Search bar and button is a user icon and name of the user logged in. When the user clicks on the icon or name drop down feature they are provided access to My Profile, My Account, Contact Support and Logout.

Desktop view




Tablet view




Phone view

### My Profile

The My Profile page provides details on the logged in user. This may contain their full name, title, email as well as Feed and Case details.

### My Account

The My Account page provides details on the logged in users company information as documented by PJM. Users may see their Client Manager listed as the Account Owner.

### Contact Support

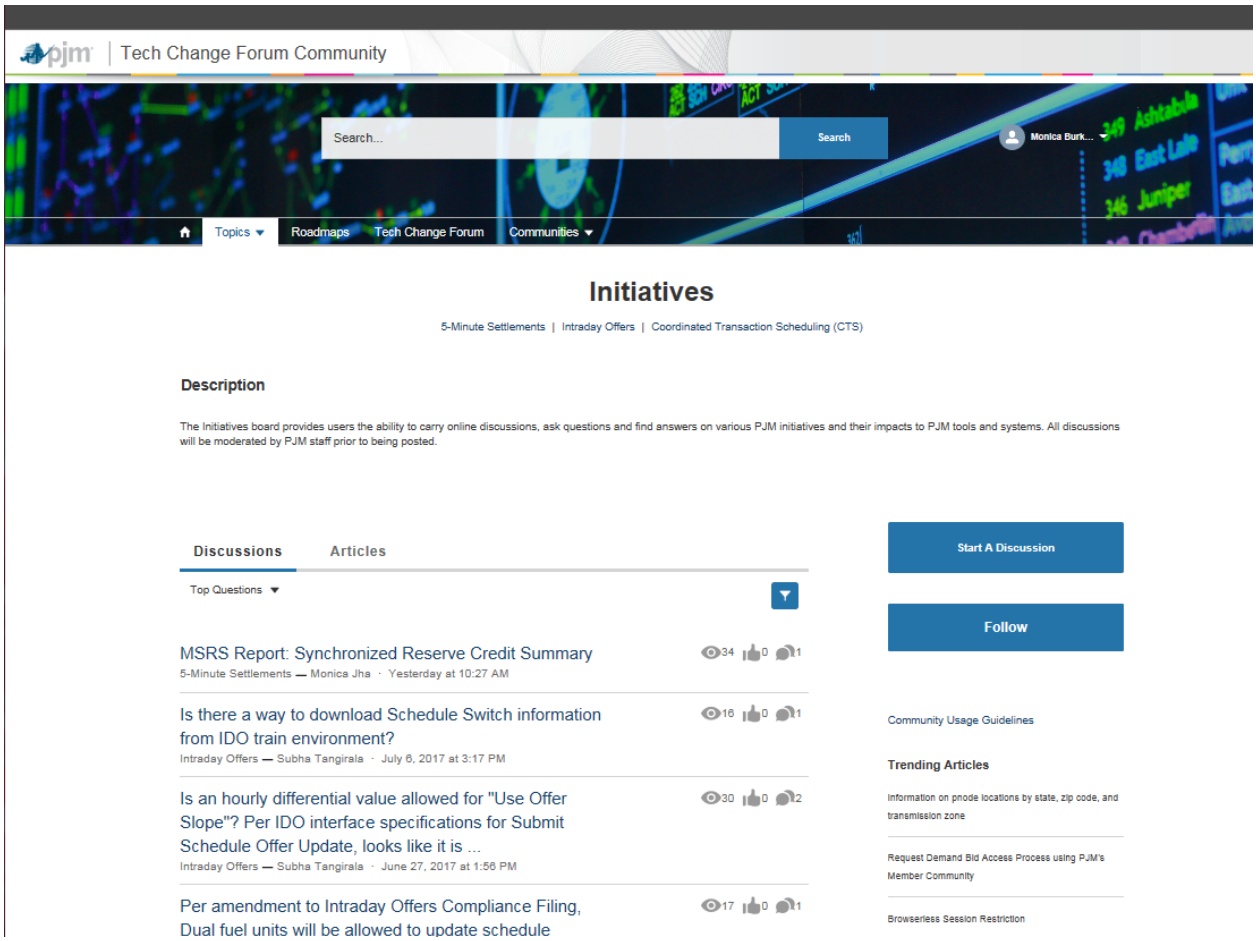
This link redirects the user to the Create a Case with PJM Customer Service form. A user can submit this form which is sent to PJM Customer Service or review related knowledge articles.

*Available on: All Communities*

## Topics Overview

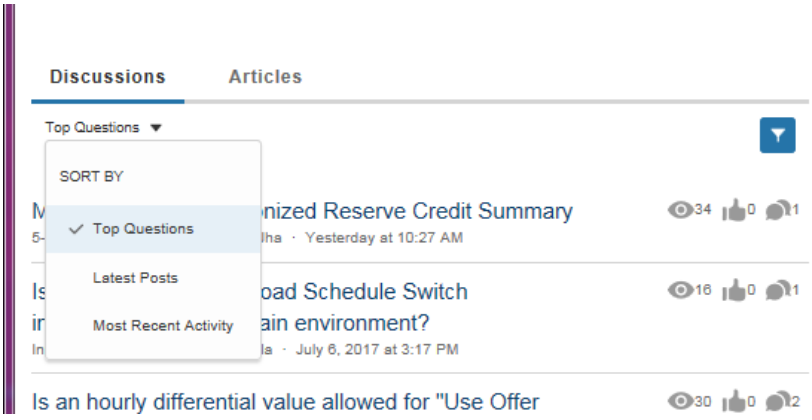
As previously stated, topics are listed based on each Community requirements. Users can access topics from the navigation bar or from the home page. Sub-topics can be accessed from the home page as well as each main topic page. In order to navigate to a topic simply click on the topic or sub-topic named link. Once on the topic page, users will have access to start discussions within each topic as well as view a listing of related knowledge articles.

Each topic page consists of a header, sub-topic links, description, a tab format section including Discussions and Articles, Start a Discussion and Follow buttons, Community Usage Guidelines link as well as Trending Articles also featured on the home page.

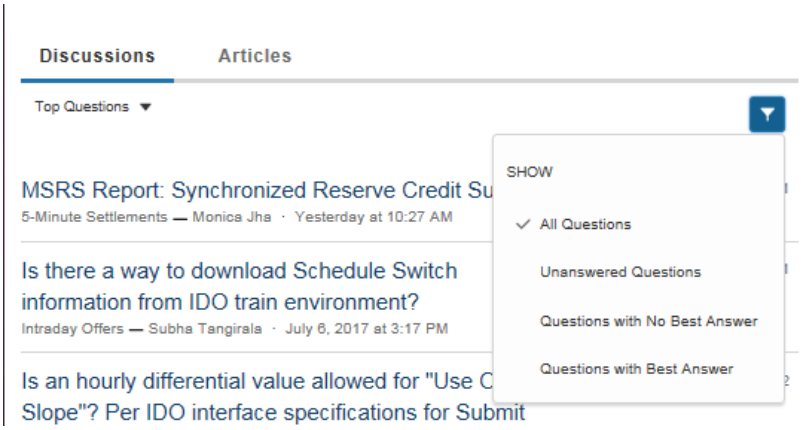



## *Discussions Tab*

The Discussions tab provides a listing of discussions for a specific topic. Within the listing users can see how many times a discussion was viewed ( 34 ), how many likes the post received ( 0 ) and how many comments or answers have been posted within the discussion ( 1 ). The list can be sorted and filtered based on user preferences. In order to change the sorting the user should click the dropdown next to the default "Top Questions". The user will have the ability to select Top Questions, Latest Posts or Most Recent Activity.



The user will also have the ability to filter discussion lists by selecting the funnel icon. The user will have the ability to select All Questions, Unanswered Questions, Questions with No Best Answer or Questions with Best Answer.

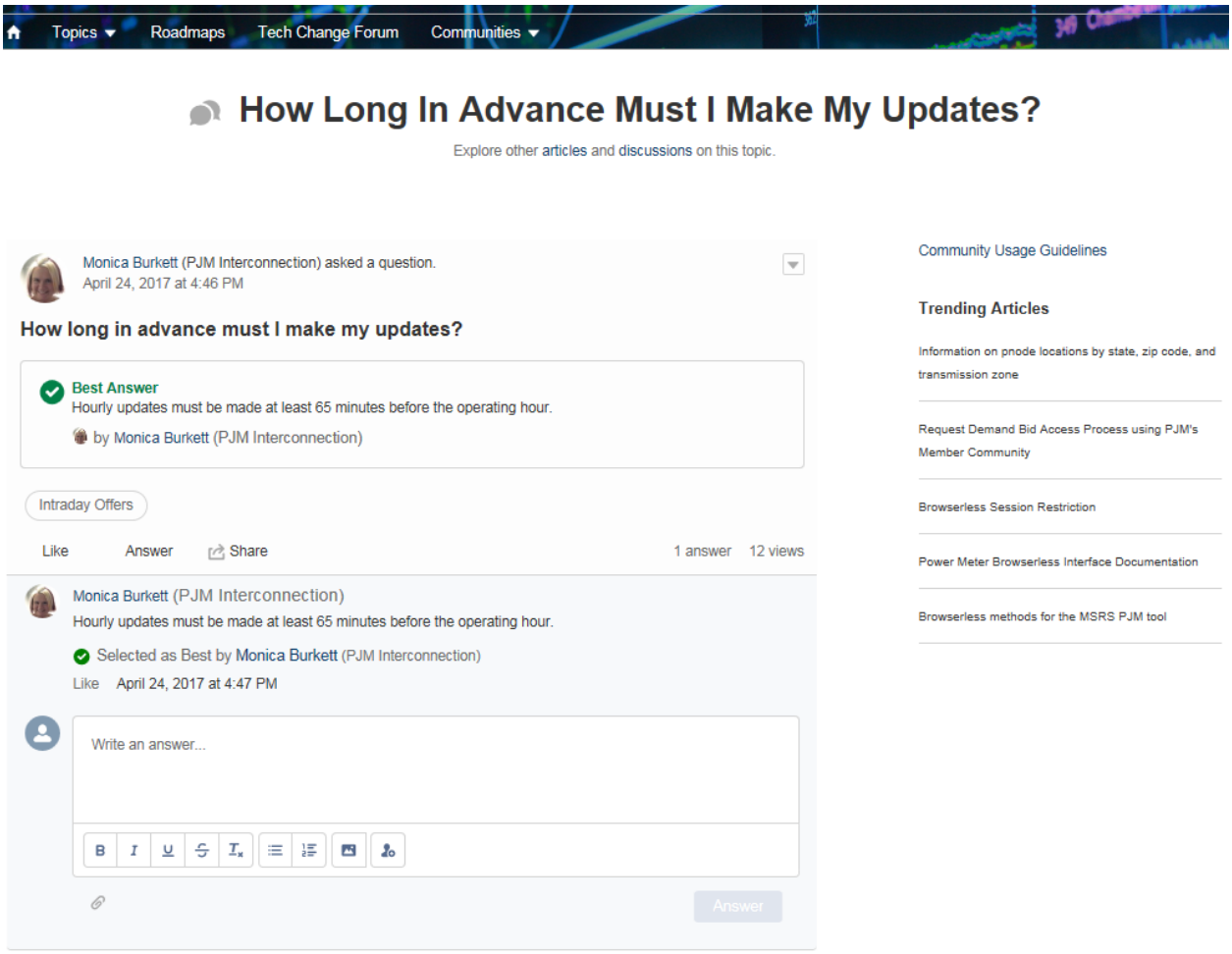



Once a user finds the discussion board they are interested in they simply click on the discussion title link to view the post and comments related to it.

## Post Details

Users have the ability to read, like and answer discussion posts and comments. Discussion posts and comments are moderated by PJM during PJM business hours. If numerous comments have been added to a post, a PJM moderator will moderate and review the answers to appropriately select the best answer. The Best Answer feature allows other community users to easily find the right answer at the beginning of the post without having to scroll through the entire list of comments.

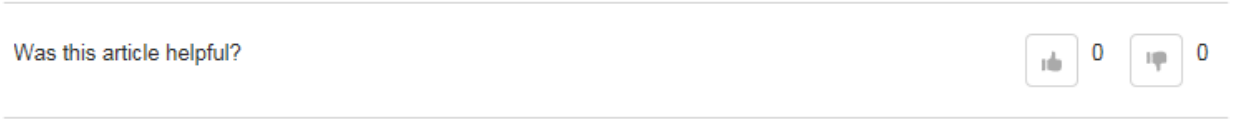
To provide an answer the user can simply type in the “Write an answer” text box and select the “Answer” button. More details can be found in the Commenting on a Discussion Post section.




## *Articles Tab*

The Articles tab provides a listing of knowledge articles available in read only format for self-service support needs. These articles provide users with procedures, instructions as well as answers to frequently asked questions. The list of articles have been pre-filtered based on the topic the user is currently in.

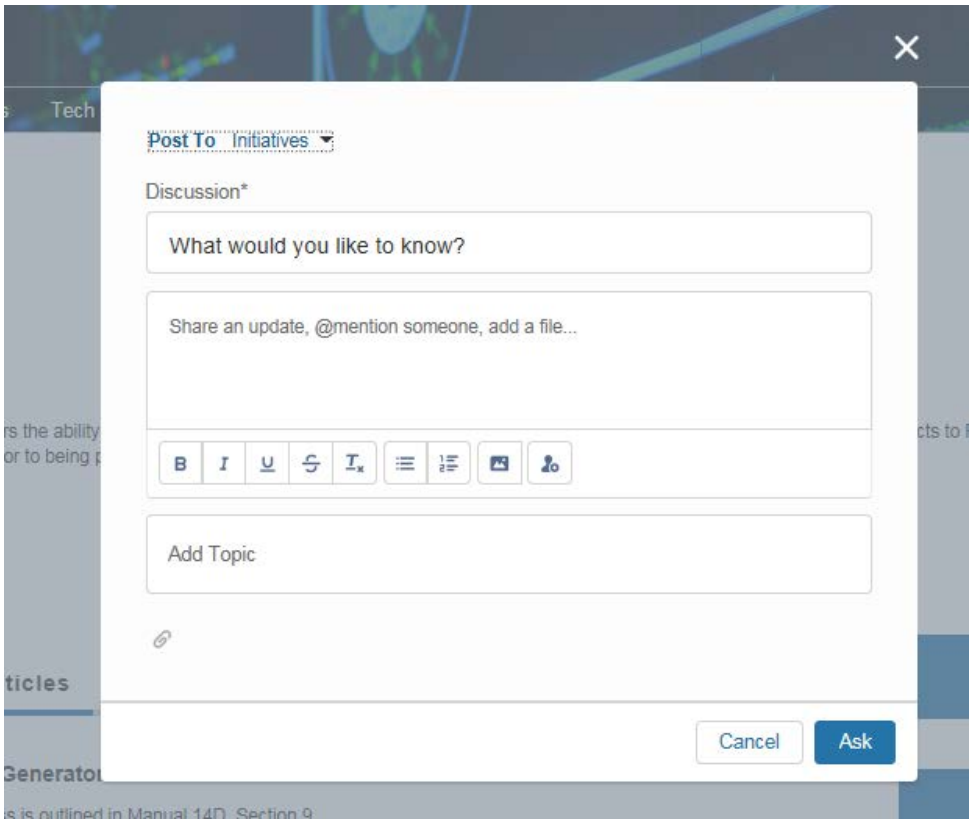
When a user is reading a knowledge article they have the ability to vote if the article was helpful. If the article was helpful the user should select thumbs up icon. If the article was not helpful, select the thumbs down icon and Contact Support with the Article name and what information you expect to see.




## *Start a Discussion Button*

After searching through the Community a user may not find what they are looking for. If that is the case, the user may click on the "Start A Discussion" button. A pop-up appears requesting information from the user. The top field, "Post To", allows

users to select the main level topic area, typically the value currently there is the one to use. As noted below, the "Add Topic" area allows for additional tagging for specific level details.

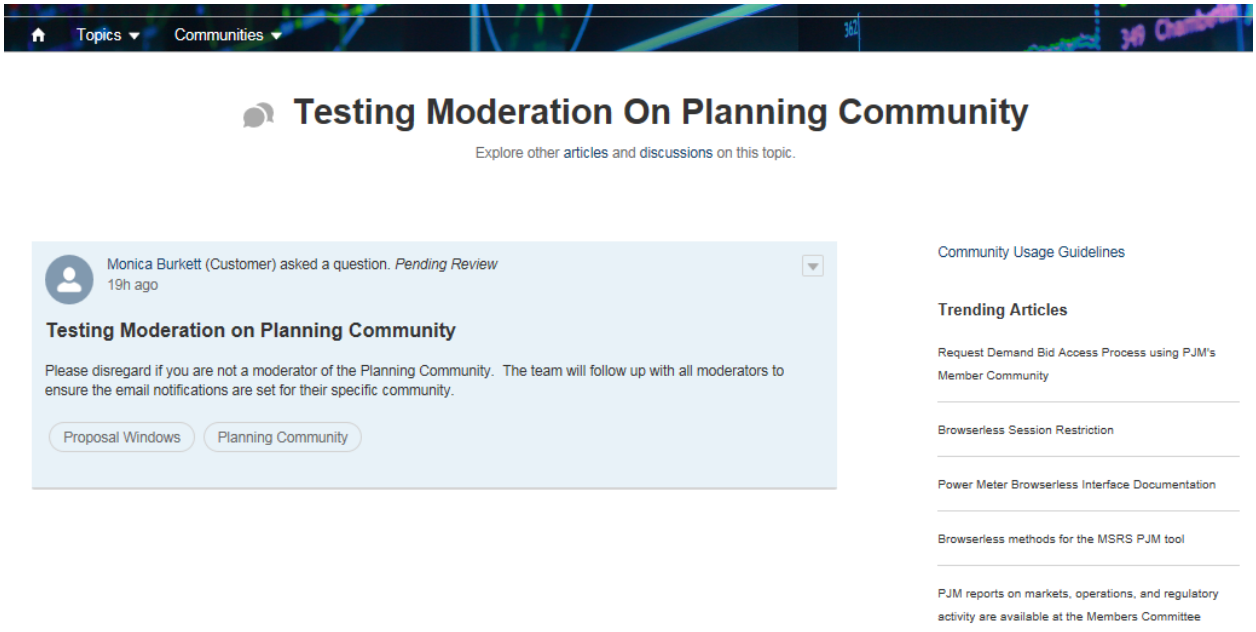



The user must then fill in the required *Discussion* field to submit a post. The following provides a description for each field on the form:

- Discussion – required field
  - This field should contain what information is being requested from PJM or the Community users.
- Large text area with default "Share an update, @mention someone, add a file…"
  - If the question is very complex the user may input additional details to assist the Community with a full understanding of the inquiry.
- Add Topic
  - The topics are auto-populated based on keywords from the *Discussion* field as well as the large text area. A user can add additional topics as necessary.
  - To add multiple topics simply use a comma between each phrase.
- Paper Clip
  - Users may attach PDF files less than 3 MB to their post.
- Ask and Cancel buttons
  - When a user is ready to submit their post they can click on the "Ask" button.
  - If a mistake was made while entering information and the question is not ready to be posted the user may click on the "Cancel" button to exit the Start A Discussion form.

## Posting of Discussion

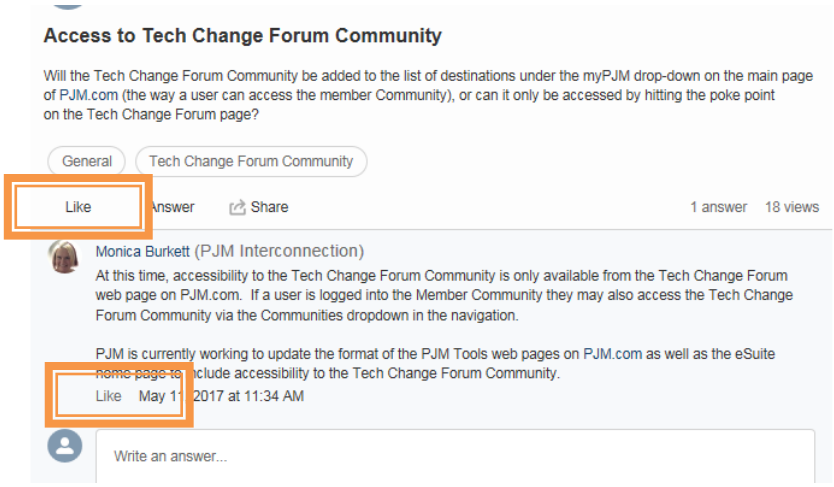
Users will see the following when submitting a post due to moderation rules set in place for the Community.




Once a discussion post or comment has been moderated and approved it will appear on the Community for all to see.

### Like feature

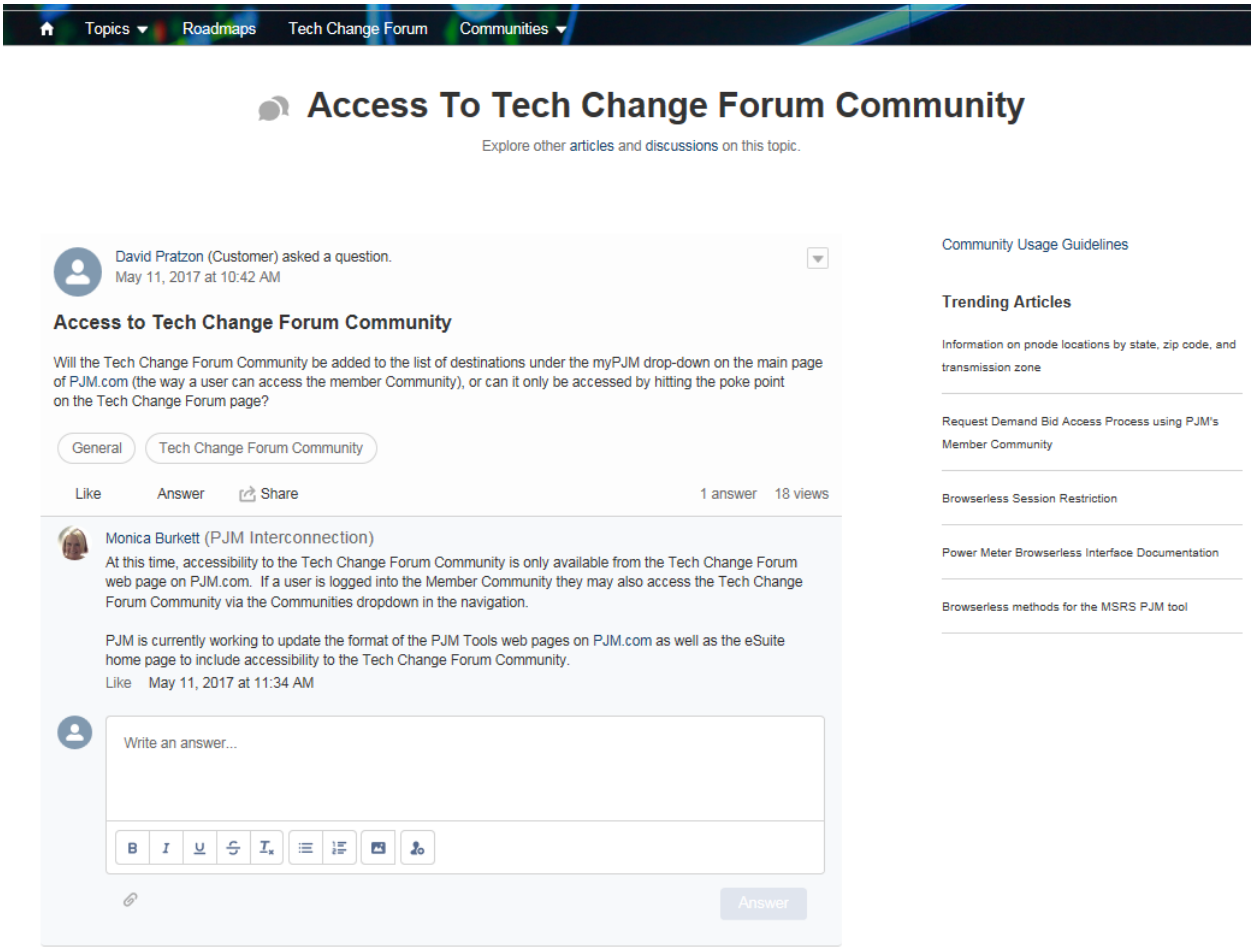
Once a post or comment has been submitted and approved it will appear on the discussion board. Users have the ability to Like posts and comments by selecting the "Like" link.



### Commenting on a Discussion Post

Users have the ability to provide comments to a discussion post. They will see their comments with a "pending review" status until a PJM Community moderator has approved the response. Once the response has been approved the user will receive an email notification that the comment has been posted to the Community

To comment on a discussion post the user would simply type a comment in the "Write an answer…" text area and click on the "Answer" button once highlighted.




## *Follow Button*

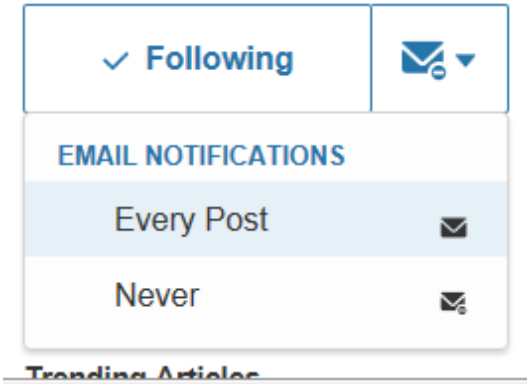
Users have the ability to follow a discussion topic or sub-topic. In order to do so the user would click on the "Follow" button that appears on the topic page.

When a user clicks on the “Follow” button any post or comment relating to that topic will then appear on the users home page in the middle area called My Feed.

Once the user follows a topic the Follow button changes to “Following” with an envelope icon for email settings.

If a user accidentally selects the “Follow” button or is no longer interested in a topic they may hover over the “Following” button and press it once it shows “Unfollow”.

As soon as the user unfollows a topic it will be removed from their feed on the home page.

## Email Notifications

Once a user follows a topic they have the option to receive email notifications. The default setting is to never receive email notifications. The user can click on the envelope icon drop down and choose Every Post or Never. Every Post will send an email notification every time a post or comment has been added to the topic discussion board. Never will not send an email notification to the user.