

# Proposed 2021 Enterprise Projects

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**Budget and Priorities Working Group**

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# Agenda

- **Project Prioritization Phases, Milestones, and Timeline**
- **2021 Enterprise Project Candidates**
- **Next Steps**

# Project Prioritization Phases, Milestones, and Timeline

# Project Prioritization Process

Phase	Description
Identification	This phase involves developing the list of project candidates taking into consideration regulatory obligations, strategic initiatives, State of the Market recommendations, necessary infrastructure enhancements, product plans, stakeholder feedback, etc.
Prioritization	This phase involves a stakeholder survey and the NYISO prioritization of projects. The stakeholder survey will facilitate an assessment of the relative priority of the topic within the portfolio and is used to determine stakeholder appeal. The NYISO prioritization incorporates the stakeholder appeal into objective criteria that reflects strategic alignment, expected outcomes, risks, and ability to execute in development of a priority score for each Market project.
Evaluation	This phase involves performing a feasibility assessment based on detailed cost and labor estimates, dependencies, priority scores, and stakeholder feedback.
Recommendation	This phase involves proposing a feasible set of project deliverables and related budget requirements. The proposal is refined as needed based on stakeholder feedback.

# Project Type

Project Type	Description
Mandatory	Strategic Initiatives and FERC Orders. These projects will be included in the budget
Continuing	Approved in a prior year and have progressed to either Software Design or Development Complete. Additional projects may be classified as Continuing based on stakeholder feedback. These projects will be included in the budget
Future	Consensus from stakeholder discussions of this projects priority relative to other projects has resulted in these projects NOT being prioritized and initiated in the coming budget year. Resources, time constraints, stakeholder feedback, and other project dependencies have been taken into consideration
Prioritize	Projects to be prioritized and included in the budget based on a feasibility assessment taking into consideration resources, time constraints, stakeholder feedback, priority score, and other project dependencies. Market projects are included in the stakeholder survey

# Project Category

Project Category	Description
Enterprise	Includes internal-facing technology and back office support projects that have no market rule changes. This list includes projects that may be noticeable to Market Participants. These projects are NOT included in the stakeholder survey
Market	Projects associated with market rule(s) including market design and study projects as well as any project implementing market rule changes. These projects are included in the stakeholder survey unless they are Mandatory, Continuing, or Future

# Project Scoring

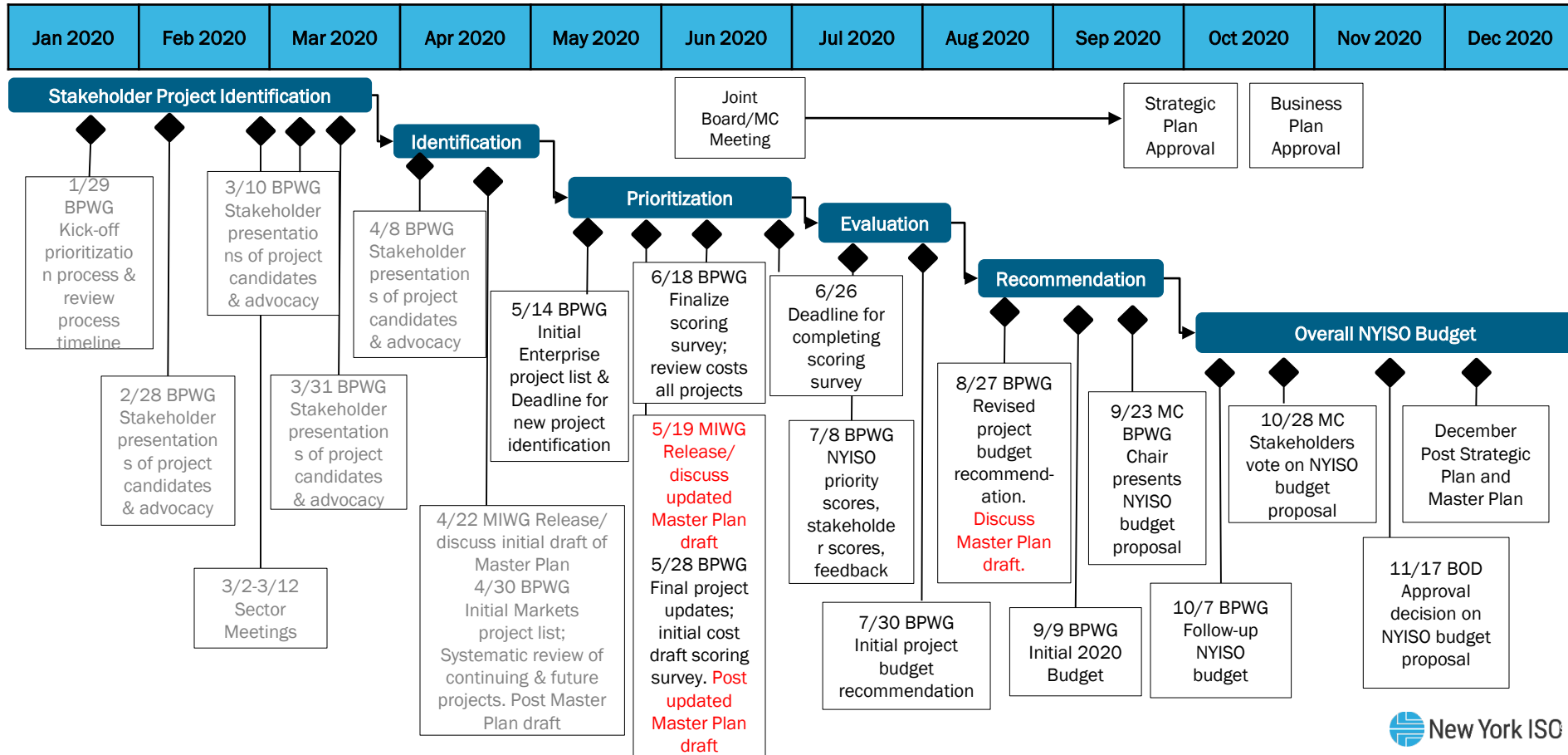
Project Scoring	Description
NYISO Only	Enterprise projects that are not Mandatory, Continuing, or Future types are scored by the NYISO Only during the Prioritization phase. These projects are included in the budget based on a feasibility assessment taking into consideration resources, time constraints, priority score and other project dependencies.
Stakeholder Scored	Market projects that are not Mandatory, Continuing, or Future are included in the stakeholder survey and scored by the NYISO during the Prioritization phase. These projects are included in the budget based on a feasibility assessment taking into consideration resources, time constraints, stakeholder feedback, priority score, and other project dependencies.

# Milestone Definitions

Milestone	Definition
Market Design Concept Proposed	NYISO has initiated, or furthered discussions with stakeholders that explore potential concepts to address opportunities for market efficiency or administration improvements.
Market Design Complete	NYISO has developed with stakeholders, a market design concept such that the proposal can be presented for a vote at the BIC or MC to define further action on the proposal.
Architectural Design	The architectural design document is complete and software development is ready to begin.
Functional Requirements	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
Software Design	The software design document is complete and software development is ready to begin.
Development Complete	Development has been completed, packaged and approved by the Supervisor.
Deployment	Required software changes to support commitment have been integrated into the production environment.
Study Complete	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
Study Defined	The scope of work for the study has been presented to stakeholders, including a discussion on the necessary input(s), assumption(s) and objective(s) of the study.
Issue Discovery	NYISO has facilitated education session(s) for stakeholder knowledge development of problem/issue, conducted stakeholder solicitation of potential solutions to address problem/issue, and summarized findings at a working group meeting for potential ranking and future project identification.



# 2021 Proposed Project Prioritization Timeline



# 2021 Enterprise Project Candidates

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
1	Enterprise Information Management - Data Integration Phase IV	Business and Finance Products	Continuing
2	FERC Form1 Redesign	Business and Finance Products	Mandatory
3	NYISO Budget (Rate Schedule 1) Cost Recovery Update	Business and Finance Products	Prioritize
4	Transactions Modifications and Confirmation Tool	Business and Finance Products	Continuing
5	Credit Price Spread Updates - Virtual & External Transactions	Business and Finance Products	Prioritize
6	Working Capital Application Enhancements	Business and Finance Products	Prioritize
7	Accounting and Settlements Integration	Business and Finance Products	Prioritize

Note: Changes from prior presentation are shown in red

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
8	Minimum Oil Burn Enhancements	Business and Finance Products	Prioritize
9	SDX API Pilot	Business and Finance Products	Prioritize
10	Stakeholder Services Salesforce CRM Enhancements	Business and Finance Products	Prioritize
11	Demand Curve Reset Tool Updates	Capacity Market Products	Prioritize
12	DAM Congestion Settlement Re-Allocation	Energy Market Products	Continuing
13	Energy Market Software Performance	Energy Market Products	Prioritize
14	ACC Control Room Renovations	Enterprise Products	Continuing

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
15	Access Management	Enterprise Products	Prioritize
16	Application Platform Upgrade	Enterprise Products	Prioritize
17	Database Upgrade	Enterprise Products	Prioritize
18	IT Infrastructure Automation	Enterprise Products	Continuing
19	IT Service Management Improvements	Enterprise Products	Continuing
20	Network Infrastructure Upgrade	Enterprise Products	Continuing
21	2021 NERC CIP Audit	Enterprise Products	Mandatory

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
22	Linux and Storage Infrastructure Refresh	Enterprise Products	Prioritize
23	Ringdown Replacement	Enterprise Products	Prioritize
24	Unified Communications Platform	Enterprise Products	Prioritize
25	Windows System Upgrade	Enterprise Products	Prioritize
26	Application Security Enhancements	Enterprise Products	Prioritize
27	Gurobi (MIP) Migration and Upgrade	Enterprise Products	Prioritize
28	Web Content Management System Upgrade	Enterprise Products	Continuing

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
29	UPS Replacement	Enterprise Products	Prioritize
30	Automated Default Bid Mitigation	Operations & Reliability Products	Continuing
31	Load Forecasting System Upgrade and Build Out	Operations & Reliability Products	Prioritize
32	Transmission and Generation Scheduling System (TAGSS)	Operations & Reliability Products	Continuing
33	NextEra Transmission Owner Integration	Operations & Reliability Products	Mandatory
34	EMS Visualization Native PI Viewer - Interface and Event Tool	Operations & Reliability Products	Prioritize
35	EMS/BMS Operational Enhancements	Operations & Reliability Products	Continuing

# 2021 Enterprise Project Candidates

Item	Project Name	Product Area	Project Type
36	Grid Guardian Network Topology Feature Implementation	Operations & Reliability Products	Prioritize
37	Natural Gas Notices Enhancement Project	Operations & Reliability Products	Prioritize
38	IT Development and Control of Compliance Reports	Operations & Reliability Products	Prioritize
39	LFDR Upgrade and Enhancements	Planning Products	Prioritize
40	Demand Forecasting Operational Reporting Enhancements (SAS)	Planning Products	Prioritize
41	ePlanning Migration	Planning Products	Prioritize
42	Dynamic Modeling Database Enhancements	Planning Products	Prioritize
43	TCC Auction Billing	TCC Products	Prioritize



# Next Steps

# Next Steps

- Written feedback on project descriptions and project type categorization may be provided up till May 20<sup>th</sup> for incorporation into May 28<sup>th</sup> presentation
  - Send to Brian Hurysz at [bhurysz@nyiso.com](mailto:bhurysz@nyiso.com) or cell (518) 461-6405
- Deadline for new project identification is today, May 14<sup>th</sup>
- Stakeholder advocacy and draft scoring survey are scheduled for May 28<sup>th</sup> BPWG
- Cost review for all projects is scheduled for June 18<sup>th</sup> BPWG with stakeholder survey distribution after the meeting
- Deadline for completing scoring survey will be June 26<sup>th</sup>

# Our mission, in collaboration with our stakeholders, is to serve the public interest and provide benefit to consumers by:

- Maintaining and enhancing regional reliability
- Operating open, fair and competitive wholesale electricity markets
- Planning the power system for the future
- Providing factual information to policymakers, stakeholders and investors in the power system



# Questions?