



2016 Project Schedule Milestone Update

Ryan Smith
Senior Manager

Budget and Priorities Working Group

June 3, 2016

Krey Corporate Center

Project Milestone and Status Definitions

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.

Status Definitions

Status	Definition
Complete	Requirements for delivery have been satisfied.
At Risk / Delayed	Progress continues but project challenges may require moving the delivery date later in the same calendar year.
Not Started	NYISO is not actively working on the project but expects the delivery can still be met based on scope of deliverable and time left to deliver.
On Schedule	Project is proceeding according to the project plan with expectations of meeting the required delivery by its target date.
Critical / Overdue	Project is in progress but project challenges may require moving the delivery date to the next calendar year or beyond the date specified in corporate incentive goals.
Reprioritized	Project has been reprioritized; resources have been reallocated to address emerging business needs which may delay the delivery date to the next calendar year or beyond the date specified in corporate incentive goals.
Cancelled	Project has been cancelled; resources have been reallocated to other efforts and there are no plans to pursue this project any further.

Project Types

Type	Definition
KP	Key project as identified in corporate incentive goal #6 target incentives and goal #7
MP	Major project as identified in corporate incentive goal #9
AP	Other approved project as identified in 2016 project budget
NP	New project to address emerging business needs

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Business Intelligence Products</i>				
Enterprise Information Management: Analytics Environments	AP	Q4	Deployment	On Schedule
Enterprise Information Management: Data Integration Phase 2	AP	Q4	Deployment	On Schedule
<i>Capacity Market Products</i>				
Winter DMNC Temperature Adjustments	MP	Q4	Market Design Complete	Complete
Reactive Test Data Management System	MP	Q2	Deployment	On Schedule
Modify the Pivotal Supplier Test (SOM)	MP	Q2	Market Design Complete ²	At Risk / Delayed
Modify Treatment of Units Being Replaced, Mothballed and Retired in Forecasts of ICAP Prices and Net Revenues (SOM)	MP	Q2	Market Design Complete ²	At Risk / Delayed
Behind the Meter: Net Generation Integration	KP	Q4	Deployment	On Schedule
Automate ICAP Import Rights	MP	Q4	Functional Requirements	Not Started

² Start of stakeholder discussions planned for Q2 2016

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Capacity Market Products (continued)				
Performance Assurance - Study	MP	Q4	Study Complete	Not Started
Model Zone K as Export Constrained	MP	Q4	Market Design Concept Proposed ³	On Schedule
Demand Curve Reset	KP	Q4	Study Complete	On Schedule
ICAP AMS Enhancements Phase 3	AP	Q4	Deployment	On Schedule
Alternative Methods for Calculating the Locational Capacity Requirements	MP	Q4	Market Design Concept Proposed ¹	On Schedule
Develop Rules for the Elimination of Capacity Zones or Achievement of Price Convergence	MP	Q4	Market Design Complete ³	At Risk / Delayed
Renewables Exemption	MP	Q4	Market Design Complete ¹	Complete
RMR Cost Recovery	MP	Q4	Deployment	Critical / Overdue

¹ Start of stakeholder discussions began in Q1 2016

³ Start of stakeholder discussions planned for Q3 2016

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Energy Market Products				
Energy Storage Optimization	MP	Q2	Market Design Concept Proposed ¹	On Schedule
Hybrid GT Pricing Improvements (SOM)	MP	Q2	Market Design Complete ¹	At Risk / Delayed
Linked Virtual Buy-Sell Transactions	MP	Q3	Functional Requirements	On Schedule
Wholesale Market Alignment with the NY PSC REV Proceeding	MP	Q3	Market Design Concept Proposed ²	On Schedule
Fuel Assurance - Constrained Fuel Supply Bidding (SOM)	MP	Q4	Functional Requirements	At Risk / Delayed
RTC-RTD Forward Horizon Coordination Improvements (SOM)	MP	Q4	Market Design Complete ²	On Schedule
Sustaining Efforts – Broader Regional Markets (BRM)	KP	Q4	Deployment	On Schedule

¹ Start of Stakeholder discussions began in Q1 2016

² Start of Stakeholder discussions planned for Q2 2016

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Enterprise Products				
NAESB Public Key Infrastructure	MP	Q2	Deployment	On Schedule
Market Test Environment	MP	Q2	Deployment	On Schedule
NERC CIP v5 Planning & Conversion - Phase II	MP	Q2	Study Complete	Complete
Stakeholder Services Suite Phase II	AP	Q2	Functional Requirements	At Risk / Delayed
Identify and Access Management (IAM) - Phase V	KP	Q3	Deployment	On Schedule
Application Platform Upgrade Phase III	MP	Q4	Deployment	On Schedule
Enterprise Monitoring Phase III	AP	Q4	Deployment	On Schedule
Storage Infrastructure Redesign Phase II	MP	Q4	Deployment	On Schedule
Telephony System Upgrade	MP	Q4	Deployment	At Risk / Delayed
Database Upgrades and Performance Improvements	MP	Q4	Deployment	On Schedule

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Finance Products				
CMS Ratings Automation	MP	Q2	Deployment	At Risk / Delayed
CMS Financial Risk Assessment Tools	MP	Q4	Deployment	On Schedule
Day Ahead Margin Assurance Payment (DAMAP) Enhancements	MP	Q4	Development Complete	On Schedule
North Subzone Redistricting	MP	Q4	Functional Requirements	On Schedule
Regulated Transmission Cost Recovery - Phase 2	AP	Q4	Software Design	Not Started
Settlements Sub Accounts	MP	Q4	Functional Requirements	Not Started
Rate Schedule 1 Technology Automation	AP	Q4	Deployment	Critical / Overdue
Foreign Guarantees	AP	Q4	Market Design Concept Proposed ⁴	On Schedule

⁴ Start of stakeholder discussions planned for Q4 2016

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Operations & Reliability Products				
Calculations for BAL Standards	AP	Q1	Deployment	Complete
Coordinated Transaction Scheduling with ISO-NE (SOM)	AP	Q1	Deployment	Complete
MetrixIDR Load Forecaster Upgrade	MP	Q1	Deployment	Complete
Breaker Level Market Modeling	MP	Q2	Deployment	On Schedule
EMS BMS System Upgrade	KP	Q2	Functional Requirements	On Schedule
Scheduling & Pricing - Comprehensive Scarcity Pricing (SOM)	KP	Q2	Deployment	At Risk / Delayed
Transmission Outage Application Platform Upgrade	AP	Q4	Deployment	On Schedule
Transmission Service Charges Rate Update	AP	Q4	Software Design	On Schedule
NERC Certification Task Management	AP	Q4	Deployment	On Schedule
FERC Funded Rerun - Phase 4	MP	Q4	Development Complete	On Schedule
2016 Reference Level Software Enhancements	AP	Q4	Deployment	On Schedule

Bold red text indicates status update since last presentation

2016 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Planning Products				
Order 1000	MP	Q4	Market Design Complete ¹	On Schedule
Solar Forecasting Initiatives	KP	Q4	Development Complete	On Schedule
Clean Power Plan	KP	Q4	Study Complete	On Schedule
TCC Products				
TCC AMS Round Type and Upgrade	MP	Q2	Deployment	Complete
TCC Balance-of-Period (TCC AMS, TCC AVS & CMS)	MP	Q4	Development Complete	On Schedule

¹ Start of stakeholder discussions began in Q1 2016

Bold red text indicates status update since last presentation

The Mission of the New York Independent System Operator, in collaboration with its 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 policy makers, stakeholders and investors in the power system*

www.nyiso.com