

2015 Project Schedule Milestone Update

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Budget and Priorities Working Group

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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 Approved	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.
RFP Initiated	NYISO has initiated a Request for Proposal (RFP) as approved by the Business Owner and is awaiting response from the vendors.

Status Definitions

Status	Definition
Cancelled	Project is no longer a priority; funds and resources should be made available to work on higher priority projects.
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 based on updated priorities, or as directed by FERC.

Project Types

Type	Definition
KP	Key project as identified in corporate incentive goal #6
MP	Major project as identified in corporate incentive goal #7
AP	Other approved project as identified in 2015 project budget
NP	New project to address emerging business needs

2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Business Intelligence Products</i>				
NY Generator Attribute Tracking System (GATS) Data Feed	AP	Q3	Deployment	At Risk / Delayed
Public Website Renewables Page	AP	Q4	Deployment	On Schedule
Public Website NYISO Budget and Value Proposition Pages	MP	Q4	Deployment	On Schedule
Enterprise Information Management: Data Integration	MP	Q4	Deployment	On Schedule
OASIS Postings Technology Upgrade Phase 2	MP	Q4	Deployment	Complete
DSS Business Objects Upgrade	MP	Q4	Deployment	On Schedule

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Capacity Market Products				
Modify the Pivotal Supplier Tests (SOM)	MP	Q1	Deployment	Complete
Fuel Assurance: Market Design Concepts	MP	Q2	Market Design Concept Proposed ⁰	Complete
Behind the Meter: Net Generation Model	MP	Q2	Market Design Approved ⁰	Complete
Reactive Test Data Collection and Tracking	AP	Q2	Functional Requirements	Complete
ICAP Auction Validating and Reporting Phase 2	AP	Q2	Deployment	Complete
ICAP AMS Enhancements Phase 2	MP	Q2	Deployment	Complete

⁰ Stakeholder discussions began in 2014

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Capacity Market Products				
Consider Rules for the Elimination of Capacity Zones or Achievement of Price Convergence	MP	Q3	Market Design Concept Proposed ³	Complete
External CRIS Rights for Non-UDR Transmission Expansion	MP	Q3	Market Design Concept Proposed ⁴	At Risk / Delayed
Winter DMNC Temperature Adjustments	MP	Q4	Market Design Approved ⁴	Reprioritized
ICAP Reference System Phase 2	MP	Q4	Functional Requirements	On Schedule
ICAP AMS Enhancements Phase 3	AP	Q4	Development Complete	Reprioritized

³ Start of stakeholder discussions began in Q3

⁴ Start of stakeholder discussions planned for Q4

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Demand Response Products</i>				
Metering Infrastructure Requirements for Demand Response	AP	Q2	Functional Requirements	Complete
SCR Performance Obligations: Satisfying Mandatory Test	AP	Q2	Deployment	Complete
SCR Performance Obligations: Change Minimum Performance Obligation from 4 to 6 Hours	AP	Q3	Market Design Approved	Cancelled
Expanding on Selected Distributed Energy Resource Concepts to Further Align with REV	MP	Q4	Market Design Concept Proposed ⁴	Complete
DRIS Enhancements for DR Program Administration	AP	Q4	Deployment	On Schedule

⁴ Start of stakeholder discussions planned for Q4

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Energy Market Products				
Fuel Assurance: Market Design Concepts	MP	Q2	Market Design Concept Proposed ¹	Complete
Behind the Meter: Net Generation Model	MP	Q2	Market Design Approved ⁰	Complete
Scheduling & Pricing: Comprehensive Shortage Pricing (SOM)	KP	Q2	Deployment*	Complete
Scheduling & Pricing: Comprehensive Scarcity Pricing (SOM)	MP	Q4	Development Complete	At Risk / Delayed
Coordinated Transaction Scheduling with ISO-NE (SOM)	KP	Q4	Deployment	On Schedule

* Activation of Comprehensive Shortage Pricing is planned for Q4

⁰ Stakeholder discussions began in 2014

¹ Stakeholder discussions began in Q1 2015

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Enterprise Products</i>				
Market Test Environment	MP	Q2	Architecture Design	Complete
Enterprise Project Management Phase IV	MP	Q2	Deployment	Complete
Integration Platform Availability Improvements	AP	Q3	Software Design	Cancelled
Windows Server Upgrades	AP	Q3	Deployment	At Risk / Delayed
Identity and Access Management Phase IV	MP	Q3	Deployment	Complete

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Enterprise Products				
NERC CIP v5 Planning & Conversion*	KP	Q4	Study Complete	At Risk / Delayed
NAESB Public Key Infrastructure	NP	Q4	Development Complete	On Schedule
Stakeholder Services Suite Phase II	AP	Q4	Deployment	Cancelled
Enterprise Technology Monitoring Phase II	MP	Q4	Deployment	On Schedule
Application Platform Upgrade Phase II (Linux)	MP	Q4	Deployment	On Schedule
Storage Infrastructure Redesign	MP	Q4	Deployment	On Schedule
Endpoint Security Enhancements	MP	Q4	Deployment	On Schedule

* All the NERC CIP v5 projects have been consolidated under this one project

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Finance Products</i>				
Procurement Enhancements	MP	Q1	Deployment	Complete
CMS True-up Exposure	MP	Q1	Deployment	Complete
North Subzone Redistricting	MP	Q2	Market Design Concept Proposed ²	Complete
Oracle Financials - Fixed Assets	AP	Q2	Deployment	Complete
Regulated Transmission Cost Recovery Implementation	MP	Q2	Deployment	Complete

² Start of stakeholder discussions planned for Q2

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Finance Products				
Rate Schedule 1 Technology Automation	AP	Q4	Market Design Concept	Complete
CMS Ratings Automation	AP	Q4	Functional Requirements	On Schedule
CMS Financial Risk Assessment Tools	MP	Q4	Functional Requirements	On Schedule
Manual Adjustments Redesign	MP	Q4	Deployment	On Schedule
CMS External Transactions Timing Adjustments	MP	Q4	Deployment	On Schedule
CMS ICAP Spot Market Offers Enhancement	MP	Q4	Deployment	On Schedule
RFP Evaluation Tool	AP	Q4	Deployment	Cancelled

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2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Operations & Reliability Products				
FERC Funded Rerun Phase 2	MP	Q1	Deployment	Complete
BES: Contingency Analysis Updates	AP	Q2	Deployment	At Risk / Delayed
BES: Interconnection Reliability Operating Limits (IROL) Visualization	AP	Q2	Deployment	Cancelled
EMS/BMS System Upgrade	AP	Q3	RFP Initiated	Complete
Smart Grid Portal	NP	Q3	Deployment	At Risk / Delayed

At Risk / Delayed text indicates status update since last presentation

2015 Project Schedule Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
Operations & Reliability Products				
MMA Market Operations Report Automation	AP	Q4	Functional Requirements	Cancelled
FERC Funded Rerun Phase 3	MP	Q4	Development Complete	On Schedule
MetrixIDR (Load Forecaster Upgrade)	NP	Q4	Development Complete	On Schedule
Gas-Electric Coordination: Fuel Availability Self Reporting (SOM)	MP	Q4	Deployment	On Schedule
2015 Reference Level Software (RLS) Enhancements	MP	Q4	Deployment	On Schedule

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2015 Project Schedule Milestones

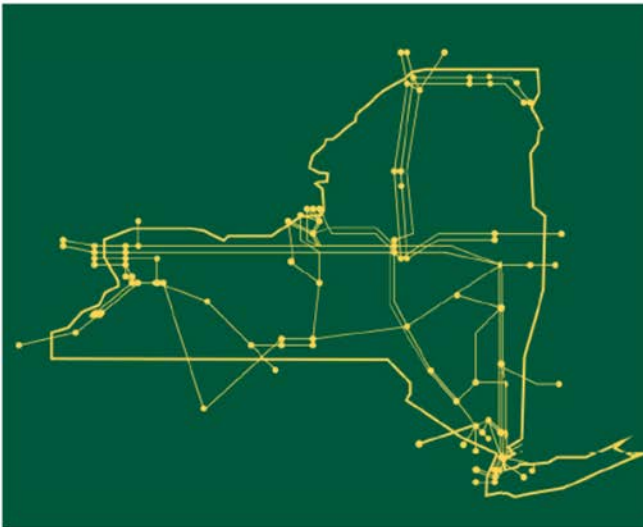
Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Planning Products</i>				
Economic Planning Model Management	AP	Q4	Functional Requirements	Cancelled
<i>TCC Products</i>				
Balance-of-Period AVS	MP	Q4	Functional Requirements	On Schedule
Balance-of-Period CMS	MP	Q4	Functional Requirements	On Schedule
Balance-of-Period AMS	MP	Q4	Software Design	On Schedule
TCC AMS Round Type and Upgrade	AP	Q4	Development Complete	On Schedule
TCC Revenue Allocation Automation	MP	Q4	Deployment	On Schedule

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Other NYISO Initiatives

Initiative	Status
Enhanced Forecasts for Buyer Side Mitigation (incentive goal#6)	Market Design Approved deliverable delayed from Q3 to Q4 due to the impact of various FERC orders
Solar Study	A status update will be provided at the ESPWG in October

The New York Independent System Operator (NYISO) is a not-for-profit corporation responsible for operating the state's bulk electricity grid, administering New York's competitive wholesale electricity markets, conducting comprehensive long-term planning for the state's electric power system, and advancing the technological infrastructure of the electric system serving the Empire State.



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