Status of Individual Projects

Market Enhancement Projects – Sorted by priority (P#)

A582 SAS 70 Type 2 Audit – Exempt Priority
- SAS 70 scope period and testing are complete.
- Work is undergoing senior management and partner review.
- Awaiting final report from KPMG.

A600 Open Billing Issues – Exempt Priority
- This ongoing project addresses identified billing issues requiring immediate action.
- Resources are assigned to address issues as they are identified or reported.

A600 – Open Billing Issues Status				
June	Open Issues at Month Beginning	Closed Issues	New Issues Opened	Open Issues at Month Ending
All issues	46	1	3	48
Goal 7 issues	2	3	2	1

(Source Billing Issues Group weekly report)

A583 Billing System Improvements Phase 2 – P1
- Customer Settlement Daily Files deployed April 23rd.
- Completed closure activities for Customer Settlements Daily Files.
- Web Based Reconciliation is in Phase E.
  - Market Participant testing began May 28th and completed on June 11th.
  - Deployment is re-scheduled for August 12th following issuance of July invoices.
- Bilateral Templates is in Phase E.
  - Deployment has yet to be determined.
- Customer Settlements Hourly Files is in Phase C.
  - Work is on hold pending the availability of resources.

A668 Scheduling & pricing non-competitive proxy interfaces – P2
- Project is currently in Phase F.
- The objective is to eliminate the price distortion that occurs at the external proxy buses when there is an absence of competitive alternative transactions.
- Software for this project was bundled with A667 Scarcity Pricing to expedite QA testing.
- Software was deployed in "OFF" position on June 17th.
- Pending FERC approval before activating.

A636 85/15 Rate Schedule 1 Split – P3
- Project is currently in Phase C.
- 85/15 component is tentatively scheduled for deployment in November.
- These additional components were added to this project, however they will be implemented following the 85/15 component:
  - EDRP allocations.
  - Local reliability reserves.
  - Local Black Start Cost Allocation
  - Thunderstorm Alert
- Deployment of these additional components has yet to be determined.

A667 Scarcity Pricing and Shadow Price Adder –P4

- Project is currently in Phase F.
- The objective is to implement reserve shortage cost pricing and allow EDRP and SCR resources to set energy prices in real-time.
- Software for this project was bundled with A668 Scheduling & pricing non-competitive proxy interfaces to expedite QA testing.
- Software was deployed in "OFF" position on June 17th, pending FERC approval.
- FERC approval was received with effective date of June 23rd.
- Software was activated on June 23rd.

A614 Day-ahead Demand Response Program Enhancements – P5

- Project is currently in Phase E.
- Demand response providers will be able to submit load reduction bids.
- Currently in System Operational/Functional Test Phase (QA Testing).
- Deployment is planned for July 14th.

A637 GT Management II / Persistent Dragging – P6

- The VP of Operations has approved the FRS.
- A testing session was conducted with LECG on June 5th to demonstrate how the persistent dragging problem is being addressed. The testing went well and was well received by LECG.
- Unit testing was conducted during the month of June. Due to the high quality of unit testing, QA testing went extremely well.
- Deployed June 24th.

A647 Station Power Accounting – P7

- Project is currently in Phase C.
- FRS is out for review.
- Several review sessions held with MP's.
- Questionnaire developed and distributed to Generation Suppliers.
- Modeling has been completed with information provided by Generation Suppliers.

A619 TransEnergie Cross Sound Cable – P8

- Project is currently in Phase C.
- Project will be re-assessed after the deployment of SMD 2.0
- FERC filing in response to Cross Sound Cable filing.

A541 TCC Online Auction Automation – P9

- Project is currently in Elaboration Phase.
- Use Case requirements documenting in progress.

A543 UCAP Auction Automation – P10
- Project is currently in Elaboration Phase.
- Project deliverables on schedule, documents in RequisitePro database.
- Use Case detailing in progress, user interface prototypes reviewed, and infrastructure validation of the architecture.

A564 Bi-directional Modeling of Generation – P11
- Project is currently in Phase B.
- The initial draft of the FRS was developed, project effort remains on hold pending the availability of resources.

A630 Mechanize Grid Accounting Voltage Support – P12
- Project is currently in Phase B.
- Work on FRS is on hold pending the availability of resources.

A624 Twelve Month Final Bill – P13
- Project is currently in Phase B.
- Work is pending feedback from Market Participants.

A628 Inter-ISO Congestion Management Settlement – N/A
- This project has been terminated based upon mutual agreement with PJM that it is no longer required.

A574 SMD 2.0 Ranger Tracking – P1

- Functional Design Documents complete; reviewed and approved by NYISO project team.
- All project hardware ordered, all major components received and staged at ABB facility.
- Test planning process underway; Factory Acceptance Test (FAT) and market trial procedures being defined.
- Software development activities underway at ABB for both Energy Management System (EMS) and market software.

A573 SMD 2.0 Market Systems Implementation – P2

- MIS/BAS interfaces are in Phase D
- MIS/BAS rules changes are in Phase B
- The PTS replacement is in Phase C
- The MMU work (Price Verification, MMRD, & Probe support) is in Phase B
- The new Load Forecaster is in Phase D

A548 DSS Settlements Datamart I – P3

- Internal and External User Acceptance Testing Completed.
- QA Testing Progressing According to Plans.
- Internal Training Completed
- On Track for June 30 Internal and July 15 External Deployment.

A559 EAI Phase II – P4

- SMD2 interfaces are in Phases B & C - concepts are being verified and solution designs are being confirmed.
- Portal's Phase D development for Release 1 is nearing conclusion as Phase E (QA testing) activities commence. Business sponsors have determined that a change in scope to the Release 1 functionality is necessary; will attempt to absorb the impact within the existing project schedule.
- Work Scheduling continues in the Concept Initiation & Development Phase: SMD2 requirements continue to be identified and alternate solutions are being investigated.
- EAI components to support the OSS PJM Ramp solution have completed Phase C (design) and are entering Phase D (development).
- EAI environment specifications are undergoing a final review prior to initiating hardware procurement.

A657 OSS (Open Scheduling System) SMD Support – P5

- Finalizing function requirements 15 minute scheduling support and in-day ICAP Pre-scheduling
- Target integration with SMD SAT testing

A661 DSS Settlements Datamart II – P6

- Finalizing function requirements

A659 OSS 1.x Enhancements - PJM Ramp/Front End Tag Integration – P7

- PJM ramp integration targeted for early August deployment.
- Technical Design underway for enhanced tagging based user interface tools.

A658 OSS 2nd Node - Operations Checkout/Tagging Enhance. – P8

- Publishing white paper outlining Facilitated Checkout concepts and benefits (for discussion at July 8th NPCC meeting).
- Facilitated Checkout pilot data exchange with ISO-NE scheduled for early July.
- Defining functional requirements for automated E-Tag integration for operations.

A662 DSS Settlements Datamart III – P9

- Finalizing function requirements

A663 DSS Settlements Datamart IV – P10

- Finalizing function requirements

A660 OSS Online Presence – P11

- Finalizing function requirements

A664 DSS Market Monitoring Datamart I – P12

- Finalizing function requirements

A620 AMP IV including Start-up and Min Gen Mitigation – P13

- It was determined that AMP IV will be incoporated into SMD phase I and will not be deployed in the legacy systems.
- Deployment now tied to SMD 2.0 anticipated in April 2004.

Phases of the Project Lifecycle	
Phase:	**Description:**
ABCDEFG	Initiation & Development Phase
ABCDEFG	Concept Phase
ABCDEFG	Design Phase
ABCDEFG	Build/Unit-Sub System Test Phase
ABCDEFG	System Operational / Functional Test Phase
ABCDEFG	System Deployment & Acceptance Test Phase
ABCDEFG	Closure Phase

Project Lifecycle Phases

Infrastructure Projects

A649 Oracle 9i Upgrades – P1
- The FRS for BAS upgrade to Oracle 9i has been completed and is being reviewed by the project team.
- Analysis of Autosys scripts is ongoing to ensure coordination with changes being introduced in the Web Based Reconciliation deployment.
- The team is evaluating the need for additional disk space for performing the upgrade as well as providing for future growth of the BAS database.
- Te team is in the process of configuring a QA server similar to the production server to perform testing and to obtain time estimates for the upgrade.

A683 BEA Upgrade – P2
- A project team has been assembled and weekly meetings are underway.
- A BEA consultant will be on-site June 30th – July 2nd to help identify the upgrade plan.
- The FRS is under development.
- Two QA servers have been identified and are being configured to support testing efforts.

A669 ClearQuest Implementation – P3
- The Vision Document (FRS) was approved on June 3rd.
- QA workflow has been developed and approved.
- Work to configure the servers and install the ClearQuest application is underway and expected to be complete July 18th.
- Training sessions for the IT departments in the use of ClearQuest are scheduled for July 24th – July 29th.
- Target deployment is set for July 31st.

A556 Documentum Implementation – P4
- Hardware requirements are being reviewed to determine if existing hardware can be used without a decrease in system performance.
- A consultant from the Structure Group has been hired and will begin work June 30th. This consultant will assist in two areas: 1) develop the Business Requirements Specifications and 2) develop the RFP to be sent to potential vendors. This work is scheduled to complete July 30th.
- The Regulatory and Committee Support groups will participate in the first Documentum pilot deployment.

A674 Facilities Management – P5
- Plans to build out the ACC and Dispatcher training at the Wolf Road facility have been developed. Meeting with Contractors are scheduled for the week of June 30th to begin construction.
- The layout of the SMD2 hardware at Wolf Road is complete. Power supply for the Data Center is scheduled for the week of June 30th to support the arrival of hardware.
- Initial SMD2 hardware is scheduled to arrive at Wolf Road July 12th.