

PPT Report to BIC – June 10, 2003

The Project Prioritization Team met most recently on May 22nd, 2003 in Albany. Meeting notes from this meeting are included at the end of this report. PPT meeting notes are also posted on the NYISO web site under the Services | Board of Directors, Committees & Working Groups | Project Management section.

The agenda included discussions about projects currently in progress. No new projects were added and no project priorities were changed. It was emphasized that there will be little opportunity for new projects to be undertaken in the legacy systems now that work is progressing on SMD. PPT will meet next on July 2nd.

The Projects Portfolio was updated to reflect the following changes:

Project Category	Previously Scheduled ¹	Completed	Reassigned ²	Additions	Currently Scheduled ³
Market & Operations Enhancements	17	0	0	0	17
Strategic Development	16	0	-4	0	12
Infrastructure ⁴	0	0	+16	0	16
Internal Projects/Studies	33	0	-16	+6	23
Total	66	0	-4	+6	68

Overall changes to the Projects Portfolio

Notes:

¹ Previously Scheduled - reflects status as of May 2nd.

² Reassigned – includes projects that have moved from one category to another.

³ Currently Scheduled - reflects status as of May 22nd PPT meeting.

⁴ A new category for Infrastructure projects was added this month and as a result a number of projects were reassigned from other project categories.

In May there was one major project deployment:

A583 Billing System Improvements: Web Based Reconciliation phase I

- The first phase of the web based reconciliation upgrade was deployed on May 21st.
- Work continues on coding and testing of the significant software changes for web based reconciliation scheduled to deploy on July 10th (immediately after the June bills are run).

Significant project work continued during the month on a number of high priority Market and Operations Enhancements projects. The current status and planned deployments for these projects are as follows:

ID	Project	Next Milestone/Deployment
A668	Scheduling and pricing non-competitive proxy interfaces	Deployment planned for June 10 th .
A636	85/15 Rate Schedule 1 Split	Q3 deployment is expected.
A667	Scarcity pricing and shadow price adder	Deployment planned for June 10 th .
.A614	DADRP Enhancements	Deployment planned for July 1 st .
A637	GT Management II/Persistent Dragging	Deployment planned for late July.

Detailed Status of Priority 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.
- Final report is expected from KPMG in late June.

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 – Billing Issues Status for May				
	Open Issues at Month Beginning	Closed Issues	New Issues Opened	Open Issues at Month Ending
All issues	40	1	6	46
Goal 7 issues	4	4	2	2

Table 3.3 (source Billing Issues Group weekly report)

A649 Oracle 9i Upgrades – P1

- Work on the DTS is on hold until resources currently working on summer projects become available.
- BAS testing under Oracle 9i continues with a deployment expected shortly after the summer projects are deployed.
- Autosys analysis is underway to ensure coordination with changes being introduced in the web based reconciliation deployment.

A623 New Loss Calculation – P2

- Deployed successfully March 25th
- Knowledge transfer completed.
- Documentation and procedural updates completed.
- Project is now closed.

A583 Billing System Improvements II – P3

- 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 will complete on June 6th.
 - Deployment is scheduled for July 10th immediately following the issuance of June 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 – P4

- Project is currently in Phase D.
- The objective is to eliminate the price distortion that occurs at the external proxy buses when there is an absence of competitive alternative transactions.
- Design complete currently in QA testing.
- FERC approval is needed before deployment.
- Deployment is planned for June 10th.

A636 85/15 Rate Schedule 1 Split – P5

- Project is currently in Phase C.
- 85/15 component is tentatively scheduled for deployment in October.
- Additional components have been added to the FRS.
 - EDRP allocations.

- Local reliability reserves.
- Local Black Start Cost Allocation
- Thunderstorm Alert
- Congestion Shortfall
- Deployment of these additional components has yet to be determined.

A667 Scarcity Pricing and Shadow Adder –P6

- Project is currently in Phase C & D.
- The objective is to implement reserve shortage cost pricing and allow EDRP and SCR resources to set energy prices in real-time.
- Deployment is planned for June 10th.

A614 Day-ahead Demand Response Project Enhancements – P7

- Project is currently in Phase D.
- Demand response providers will be able to submit load reduction bids.
- FRS complete - credit policy reviewed and approved.
- Deployment is planned for June 28th.

A637 GT Management II / Persistent Dragging – P8

- The FRS has been reviewed and sent out for VP approval.
- A design was developed that drastically cut down on the amount of coding time required to implement the new functionality.
- The SCD and VN1 changes have been coded and unit tested.
- Testing session conducted with LECG on June 5th to demonstrate how the persistent dragging problem is being addressed.
- It is expected that code will go into QA on June 6th.
- Deployment is planned for June 17th.

A620 AMP IV including Start-up and Min Gen Mitigation – P9

- Project is currently in Phase B.
- It was determined that AMP IV will be incorporated into SMD phase I and will not be deployed in the legacy systems.
- Deployment now tied to SMD 2.0 anticipated for April 1, 2004.

A619 TransEnergie Cross Sound Cable – P10

- 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 and UCAP Auction Automation –P11

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

A543 UCAP Auction Automation – P12

- 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 – P13

- Project is currently in Phase B.
- Work on FRS is on hold pending the availability of resources.

A630 Mechanize Grid Accounting Voltage Support – P14

- Project is currently in Phase B.
- Work on FRS is on hold pending the availability of resources.

A624 Twelve Month Final Bill – P15

- Project is currently in Phase B.
- Work is pending feedback from Market Participants.

A647 Station Power Accounting – P16

- 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.

A628 Inter-ISO Congestion Management Settlement – P17

- This project has been terminated based upon mutual agreement with PJM that it is no longer required.

Strategic Development Projects

A548 DSS Settlements Datamart I

- Development complete; testing is current major focus.
- DSS dependencies on summer project changes are being identified and assessed.
- Release I data collection began June 1
- Release I deployment on schedule for July 15th

A559 EAI Phase II

- SMD2 interfaces are in Phases B & C - concepts are being verified (web postings), solution designs are being defined (price verification) and development is ongoing (load forecast).
- Portal development (Phase D) continues; business sponsors have agreed with the Portal Release 1 design and associated functionality.
- Work Scheduling continues in the Concept Initiation & Development Phase; SMD2 requirements are being gathered.
- EAI architecture and supporting development guidelines have been established; a document is being prepared for review. The EAI architecture includes the EAI Security Model and the Hawk Monitoring Approach.
- EAI environment specifications are undergoing a final review prior to initiating hardware procurement.

A573 SMD 2.0 Market Systems Implementation

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

A574 SMD 2.0 Ranger Tracking

- 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.

A657 OSS (Open Scheduling System) SMD Support

- Project in currently in Phase B – Concept

Infrastructure Projects

A556 Documentum Implementation

- Hardware requirements for Documentum will be coordinated with several other projects (web portal, OSS II and TCC/UCAP) to minimize costs and optimize expandability.
- Reviewing alternatives for web content management tools.
- Document workflows are being developed for pilot deployments.

A669 ClearQuest Implementation

- ClearQuest is a defect tracking software application that will be used internally.
- Unix and NT hardware has arrived. Unix hardware has been configured.
- The Vision Document (FRS) was approved on June 3rd.
- A QA workflow has been developed and is now in review.

A683 BEA Upgrade

- BEA is the supplier of Web Logic software application that is used on NYISO web servers.
- This project is intended to plan for and implement the upgrade on all necessary servers.
- A QA workflow has been developed and is now in review.
- Decision made to use Web Logic 8.1 for this development.
- Production environments will require upgrades from version 6.1 to 8.1.

A674 Facilities Management

- This new project will track facilities issues primarily related to the SMD2 project.
- A QA workflow has been developed and is now in review.
- Initial design work underway for redundancy and fail over requirements.

Phases of the Project Lifecycle	
Phase:	Description:
A B C D E F G	Initiation & Development Phase
A B C D E F G	Concept Phase
A B C D E F G	Design Phase
A B C D E F G	Build/Unit-Sub System Test Phase
A B C D E F G	System Operational / Functional Test Phase
A B C D E F G	System Deployment & Acceptance Test Phase
A B C D E F G	Closure Phase

Table 3.4 Project Lifecycle Phases