Proposed 2023 Enterprise Projects

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Budget and Priorities Working Group

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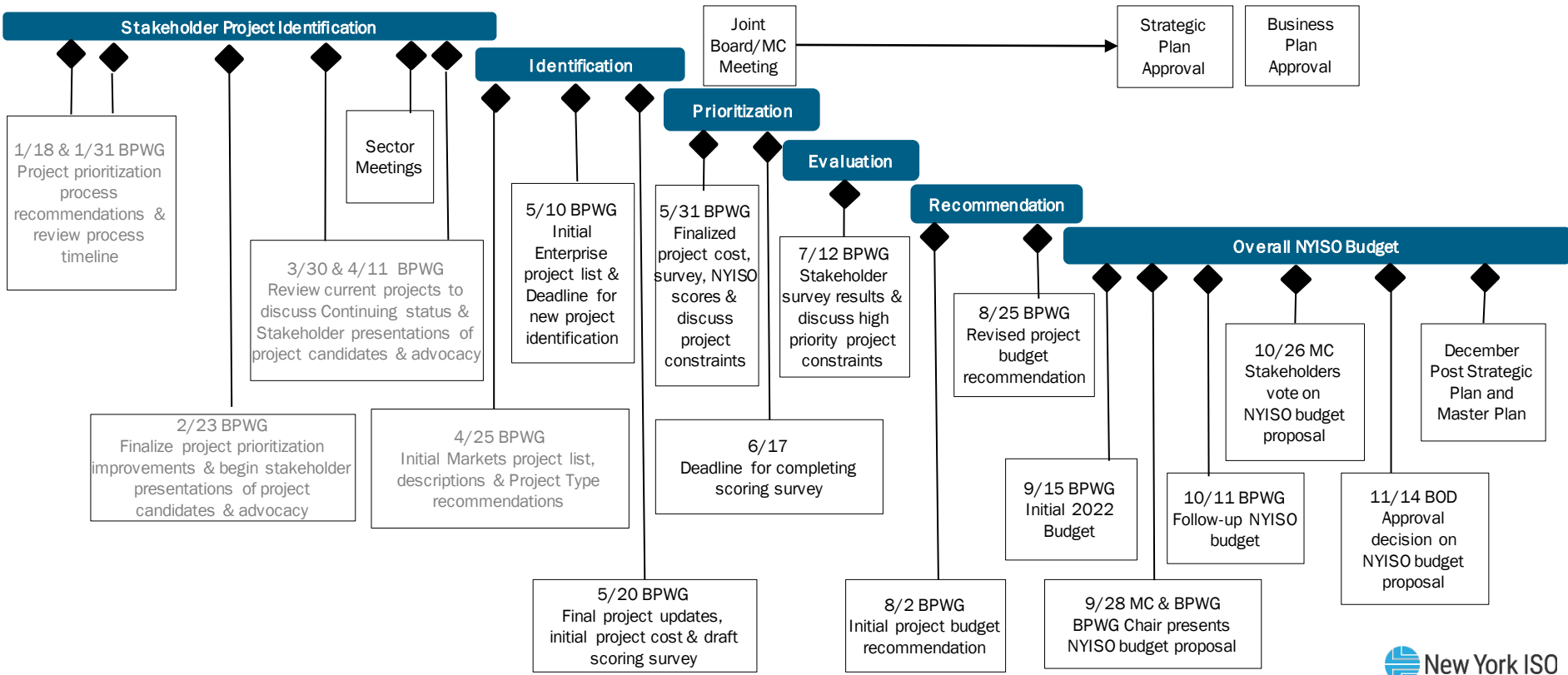
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Agenda

- Project Prioritization Timeline

- Project Descriptions

- 2023 Enterprise Project Candidates

- Next Steps

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Project Prioritization Timeline

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2023 Proposed Project Prioritization Timeline

Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022

Stakeholder Project Identification

Identification

Prioritization

Evaluation

Recommendation

Overall NYISO Budget

Joint Board/MC Meeting

Strategic Plan Approval

Business Plan Approval

1/18 & 1/31 BPWG Project prioritization process recommendations & review process timeline

Sector Meetings

3/30 & 4/11 BPWG Review current projects to discuss Continuing status & Stakeholder presentations of project candidates & advocacy

5/10 BPWG Initial Enterprise project list & Deadline for new project identification

5/31 BPWG Finalized project cost, survey, NYISO scores & discuss project constraints

7/12 BPWG Stakeholder survey results & discuss high priority project constraints

8/25 BPWG Revised project budget recommendation

10/26 MC Stakeholders vote on NYISO budget proposal

December Post Strategic Plan and Master Plan

2/23 BPWG Finalize project prioritization improvements & begin stakeholder presentations of project candidates & advocacy

4/25 BPWG Initial Markets project list, descriptions & Project Type recommendations

6/17 Deadline for completing scoring survey

9/15 BPWG Initial 2022 Budget

10/11 BPWG Follow-up NYISO budget

11/14 BOD Approval decision on NYISO budget proposal

5/20 BPWG Final project updates, initial project cost & draft scoring survey

8/2 BPWG Initial project budget recommendation

9/28 MC & BPWG BPWG Chair presents NYISO budget proposal

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Project Descriptions

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Project Descriptions

- The NYISO has developed project descriptions for 50 proposed Enterprise projects
  - 7 Business & Finance, 3 Capacity Market, 2 Energy Markets, 16 Enterprise, 2 New Resource, 9 Operations and Reliability, 4 Planning & 0 TCC Market
  - 0 Mandatory, 10 Continuing, 41 Prioritize & 0 Future

- Last year, there were 45 proposed Enterprise projects at this time in the project prioritization process

- Project descriptions are included with today's posted meeting materials

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2023 Enterprise Project Candidates

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Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
1	Access Management Platform Upgrade	Enterprise	Prioritize	Deployment	
2	Block Storage Refresh	Enterprise	Prioritize	Deployment	
3	BSS and BillSim Upgrade	Enterprise	Prioritize	Deployment	
4	BTM Solar Demand Forecasting Product Enhancements	Planning	Prioritize	Deployment	Functional Requirements
5	Budgeting Tool	Business & Finance	Prioritize	Functional Requirements	
6	Building Management System (BMS) Controls Upgrade	Enterprise	Prioritize	Deployment	
7	Carman Security Enhancements	Enterprise	Prioritize	Deployment	

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Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
8	CMS and ConInvoice Data Integration	Business & Finance	Prioritize	Deployment	Functional Requirements
9	Contingency Analysis Results for Transmission Owner Situational Awareness	Operations & Reliability	Prioritize	Deployment	Functional Requirements
10	Control Room Logging Replacement	Operations & Reliability	Prioritize	Functional Requirements	
11	Credit Price Spread Updates Virtual and External Transactions	Business & Finance	Prioritize	Deployment	Functional Requirements
12	Demand Forecasting Operational Reporting Enhancements	Planning	Prioritize	Functional Requirements	
13	DER Operational Enhancements	New Resource	Prioritize	Deployment	
14	Generator Modeling Database Enhancements	Planning	Prioritize	Deployment	

Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
15	GFER Enhancements	Operations & Reliability	Prioritize	Deployment	
16	Grid Operations Web Forms Enhancements	Enterprise	Prioritize	Deployment	
17	Gurobi Upgrade	Operations & Reliability	Prioritize	Deployment	
18	ICAP Supplier Status Enhancements	Capacity Market	Prioritize	Functional Requirements	
19	IT Development and Control of Compliance Reports	Operations & Reliability	Prioritize	Deployment	
20	Krey Control Room A/V Replacement	Enterprise	Prioritize	Deployment	Study Complete
21	LFDR Upgrade and Enhancements	Planning	Prioritize	Deployment	Functional Requirements

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Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
22	Machine Learning Research and Technology Pilot	Enterprise	Prioritize	Study Complete	
23	Market Validation, Reporting and Penalty Enhancements	Capacity Market	Prioritize	Software Design	Functional Requirements
24	Meter Services System	Business & Finance	Prioritize	Deployment	Functional Requirements
25	Modernizing ASIS	Enterprise	Prioritize	Deployment	
26	Natural Gas Notices Enhancement Project	Operations & Reliability	Prioritize	Deployment	Functional Requirements
27	Network Manager Cisco Refresh	Enterprise	Prioritize	Development Complete	
28	Next Gen Security Architecture	Enterprise	Prioritize	Study Complete	

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Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
29	OASIS Reliability Upgrade	Enterprise	Prioritize	Study Complete	
30	OMS Enhancement	Operations & Reliability	Prioritize	Deployment	
31	On-Boarding of New Resources	New Resource	Prioritize	Study Complete	Study Complete
32	Ongoing TCC Collateral Coverage Assessment Tool	Business & Finance	Prioritize	Deployment	
33	Outage States Portal Dashboard	Capacity Market	Prioritize	Functional Requirements	
34	Price Correction Report Modifications	Operations & Reliability	Prioritize	Deployment	

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Prioritize 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
35	Redundant Wind Solar Forecast Feed - Independent Vendor	Operations & Reliability	Prioritize	Issue Discovery	
36	Secure Communication Channel with MPs	Energy Market	Prioritize	Deployment	
37	Settlement Systems Effective Dating and Filtering of Billing Entities	Business & Finance	Prioritize	Software Design	
38	Smart Grid Upgrade	Enterprise	Prioritize	Deployment	
39	Transaction Modifications API	Business & Finance	Prioritize	Deployment	
40	Watchlist for Rest of State Units	Energy Market	Prioritize	Deployment	

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Continuing 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
41	Application Platform Upgrade	Enterprise	Continuing	Deployment	Deployment
42	Database Upgrade	Enterprise	Continuing	Deployment	Deployment
43	EMS/BMS Operational Enhancements	Operations & Reliability	Continuing	Deployment	Deployment
44	IT Infrastructure Automation	Enterprise	Continuing	Deployment	Deployment
45	ITSM Security Enhancements	Enterprise	Continuing	Deployment	Deployment
46	Microsoft 365	Enterprise	Continuing	Deployment	Deployment
47	Network Infrastructure Upgrade	Enterprise	Continuing	Deployment	Deployment

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Continuing 2023 Enterprise Projects

Item	Project	Product Area	Project Type	2023 Proposed Deliverable	2022 Deliverable
48	Unified Communications Platform	Enterprise	Continuing	Deployment	Deployment
49	UPS Replacement	Enterprise	Continuing	Deployment	Study Complete
50	Windows System Upgrade	Enterprise	Continuing	Deployment	Deployment

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Next Steps

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Next Steps

- Written feedback on project descriptions and project type categorization may be provided until May 12th for incorporation into May 20th presentation
  - Send email to Kevin Pytel at kpytel@nyiso.com or call cell at (518) 428-9528 for assistance
- Final updates to proposed 2022 Market and Enterprise projects to be reviewed at the May 20th BPWG
- Stakeholder advocacy and draft scoring survey of Market Projects are scheduled for the May 20th BPWG
- NYISO provides scores for Market and Enterprise projects at the May 30th BPWG

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Our Mission & Vision

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Mission
Ensure power system reliability and competitive markets for New York in a clean energy future

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Vision
Working together with stakeholders to build the cleanest, most reliable electric system in the nation

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Questions?

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Appendix – Milestones and Project Prioritization Phases

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Milestone Definitions

Milestone	Definition
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.
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.
Study Complete	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
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.
Functional Requirements	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
Architectural Design	The architectural design document is complete and software development is ready to begin.
Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input	
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.

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Project Prioritization Process

Phase	Description
Stakeholder Project Identification	Stakeholders may present project ideas at stakeholder meetings, sector meetings, get feedback and refine their proposal during this phase before the NYISO provides a comprehensive list of candidate projects for consideration.
Identification	The NYISO develops a Markets and Enterprise project candidate lists from regulatory obligations, strategic initiatives, State of the Market recommendations, infrastructure enhancements, product plans and stakeholder proposals. These are presented and further refined with stakeholder input during this phase.
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.

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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, Development Complete, or Deployment. 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

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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

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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.

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